Alameda County
Behavioral Health Care Services

Insyst
AOD Mini Manual
9.10

BHCS – Information System Support Services

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Contents

Chapter 1: Getting Started 4

Chapter 2: Basic Client Information.....12

Chapter 3: Client Episodes 30

Chapter 4: Direct Services 51

Chapter 5: Utilities (Passwords and Printing) 64

Chapter 6: Reports 68

Appendix A: Special Key Sequences.....81

County / State Codes:…….. 84

INSYST MENU SHORTCUTS AND COMMANDS……....86

9-29-14

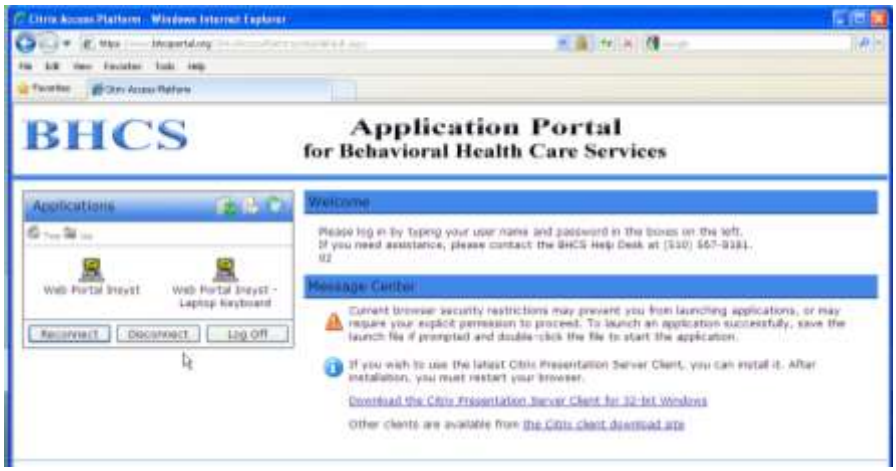
Chapter 1
Logging On

Logging the BHCS Web Portal

You must log onto the BHCS Web Portal to access INSYST.

1. The BHCS Web Portal address is: https://www.bhcsportal.org
2. Type your Username, and press Tab
3. Type your password and press Return or click Logon button. To protect its secrecy, your password is displayed on your screen as dots.

4. Chose the type of computer (Desktop or Laptop) you are using.

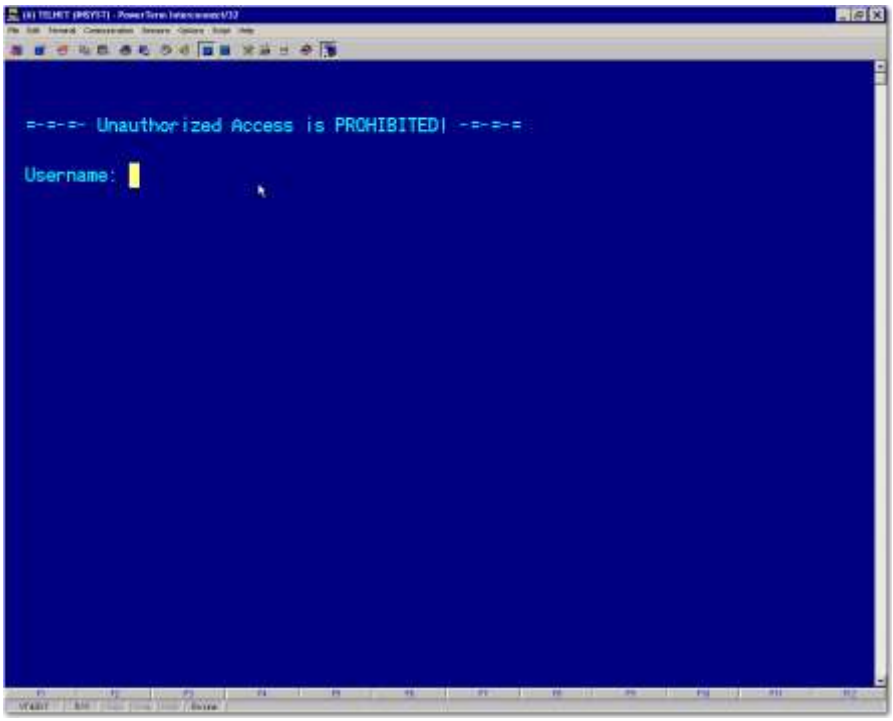


Note: A new Internet Explorer Window will open with the INSYST Logon Screen.

Make sure you **LOGOFF** the Web Portal **BEFORE** closing the Internet Explorer Window.

Logging on to INSYST

1. Your screen displays the prompt: **USERNAME:** Type your Username, and press Return.
2. Then the computer prompts you for your password. Type your password and press Return. To protect its secrecy, your password is not displayed on your screen.
3. INSYST displays its Logo and any notices or messages. Press Return to scroll to the first of two bulletin boards, followed by the Main Menu.



Note: Make sure you **LOGOFF** the INSYST **BEFORE** closing the Internet Explorer Window.

Using Menus

An INSYST menu is a list of items that you may select. Figure 1.1 is shows a sample Main Menu. The Main Menu is different based on data input requirements. Below is an example of an Opening Main Menu for user who is entering data for both Mental Health Services and Alcohol and Other Drugs Services. Most users don't have this menu option.

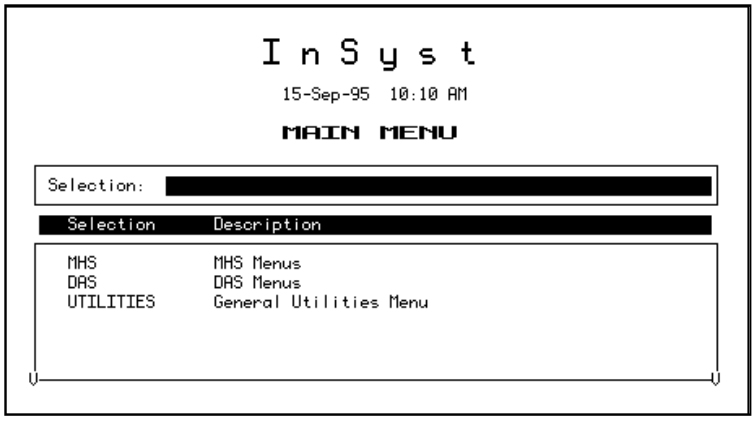


Figure 1.1: Main Menu

The menu structure is virtually the same for the MHS and the DAS systems. Some screens are different for the two systems; this manual only provides details MHS screens. The MHS Main Menu is shown in Figure 1.2.

After you make a selection from the Main Menu, the system displays a submenu. For example, if you choose UTILITIES in the Main Menu, you will move to the Utilities Menu, with options that you select to use INSYST utilities.

Note: Based on your User Authorization all menu options may not be activated.

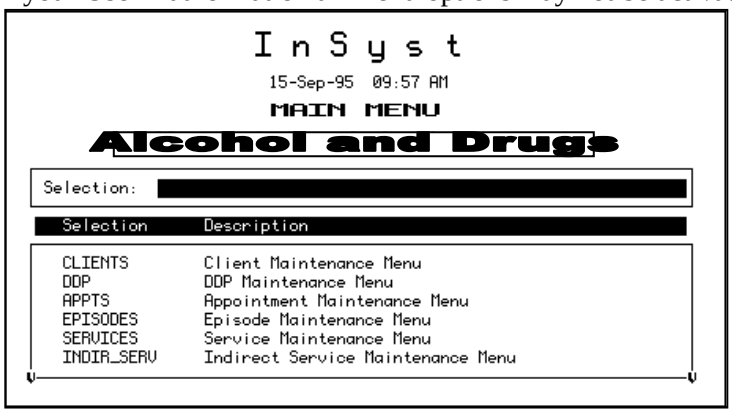


Figure 1.2: MHS Main Menu

All INSYST menus let you make selections in three ways: by using the list of options in the menu selection area, or by typing an alpha or numeric option directly in the command line.

To select a command in the Menu Selection Area:

1. Press the Tab key and the blinking cursor will move from the Command Line into the list of items in the Menu Selection Area of the screen. Then move the cursor up and down through the menu using the Up and Down Arrow keys.
2. When you have moved the cursor to the item you want, type "X" and press Return.

   At the bottom corners of the Menu Selection Area there is often a flashing "V." This indicates that there are more items on your menu than you can see at one time. Press the Down Arrow key and the menu will scroll to display more items.

   If you want to return to the Command Line, press Enter.

To select an item from the Command Line:

1. Type the name or number of the item on the Command Line. The command line is the solid bar next to the word Selection, where the cursor is when you first display the menu. You may type the entire name of the item, or just enough make it distinct from the others. For example, if you want to choose SERVICES from the Main Menu, you may type either "SERVICES" or "SER". You may also type the number of the selection. For example, if Client Records Maintenance is the first item on the menu, you can just type "1" to select it.
2. Press Return to display the screen or sub-menu you selected.

Leaving a Menu

Press Num Lock (Gold)-E, or enter a hyphen (-) in the Command line to move back one menu to the previous menu. For example, if you are on the Files Menu, "-" will take you back to the Utilities Menu, and a second "-" will take you back to the Main Menu.

Using Num Lock (Gold) and Control Keys

To use a Num Lock (Gold) Key sequence:

1. Press and release the Num Lock (Gold) Key.
2. Press and release the other key in the sequence.

For example, if the instructions say, "Press Num Lock (Gold)-E", you should press and release the Num Lock (Gold) key, and then and release press "E".

Note: Menu and Control Key Commands are located on the last page and the back of this manual.

Laptop Users Note:

Use the "F9" Key as the Num Lock key replaces the Num Lock key if your laptop does not have a ten key pad.

Menu Shortcuts

You can go directly from one menu to a screen that is under another menu, rather than moving through the menu system one menu at a time. In the command line of the current menu, enter the Menu names that you would normally enter in the command lines of one menu after another.

For example, to go from the Main Menu to the Episode Opening screen, you normally enter "EP" in the Main Menu to display the Episode Records Menu, and then enter "OP" to display the screen. As a shortcut, you can enter the command "EP OP" in the Main Menu command line (Figure 1.3).

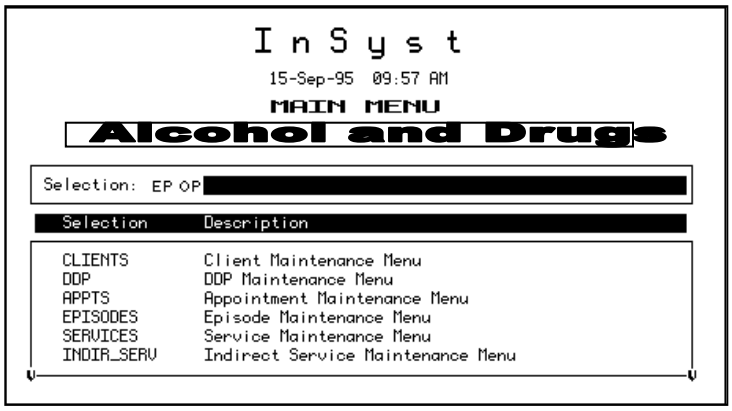


Figure 1.3: Using Menu Shortcuts

Using Screens

INSYST's menu system displays the data screens (Figure 1.4) that let you enter, look up, change and delete information.

In Screens, data is entered or displayed in areas called ***fields***. For example, a screen may have a field for a client's last name and another field for address. Most screens have special fields, called ***key fields*** that identify each record such as the client number field that identifies each client.

Each screen has a different function—*e.g.*, to register a client, review a client's account, or update episode information. Screens are assigned to you based on your responsibilities.

Figure 1.4: An INSYST Screen with a List

Moving through Fields

Use these keys to move through a screen's fields:

- **Tab:** Move the cursor to the next field to enter data. (If you fill a field entirely, the cursor will move to the next field automatically).
- **Control/H: (F12)** Move the cursor back one field.
- **Return:** Skip over optional fields and move to the next required field or to the prompt used to leave the screen.

Moving Through Lists

Many screens have lists, like the list of insurance companies shown in Figure 1.4 above. To move down one item in the list, press the Tab or Down Arrow key. To move up one item in the list, press the Up Arrow key.

If a list has more items than fit in one screen, you can page through it to see more items by pressing:

- **Num Lock (Gold)-M: (More)** View the next page of information.
- **Num Lock (Gold)-B: (Backup)** View the previous page of information.

To speed up performance, lists usually include only two pages of information by default. If you have to see more items than this, you should request unlimited paging by pressing **Num Lock (Gold)-A** before you display the list.

Leaving a Screen

To leave a screen, press:

- **Return:** In most cases, pressing Return moves the cursor to the prompt used to leave the screen. (In some cases, Return skips over optional fields to the next required field.)
- **Num Lock (Gold)-E:** Exits from the current screen and returns to the menu, without saving data entered in the screen.
- **Num Lock (Gold)-S:** Exits from the current screen, and saves the data entered. This sequence retains the current Client and Reporting Unit, so it automatically displays it in the next screen you use.

Menu and Control Key Commands are located on the last page and the back of this manual and in Appendix C on page 74 of this manual.

Client Confidentiality

INSYST helps your staff in maintain confidentiality, as required by HIPAA, federal, state, and local regulations.

Do not let anyone else use your account. You username is recorded on some records in the database.

Each registered user has a password. **Do not give out your password** for use by other staff or post it near your terminal.

Do not browse through records looking for friends, acquaintances or known persons. **This is illegal.** You must have a legitimate purpose for looking-up a person.

Do not release data without authorization. For more information, consult your Medical Records Department.

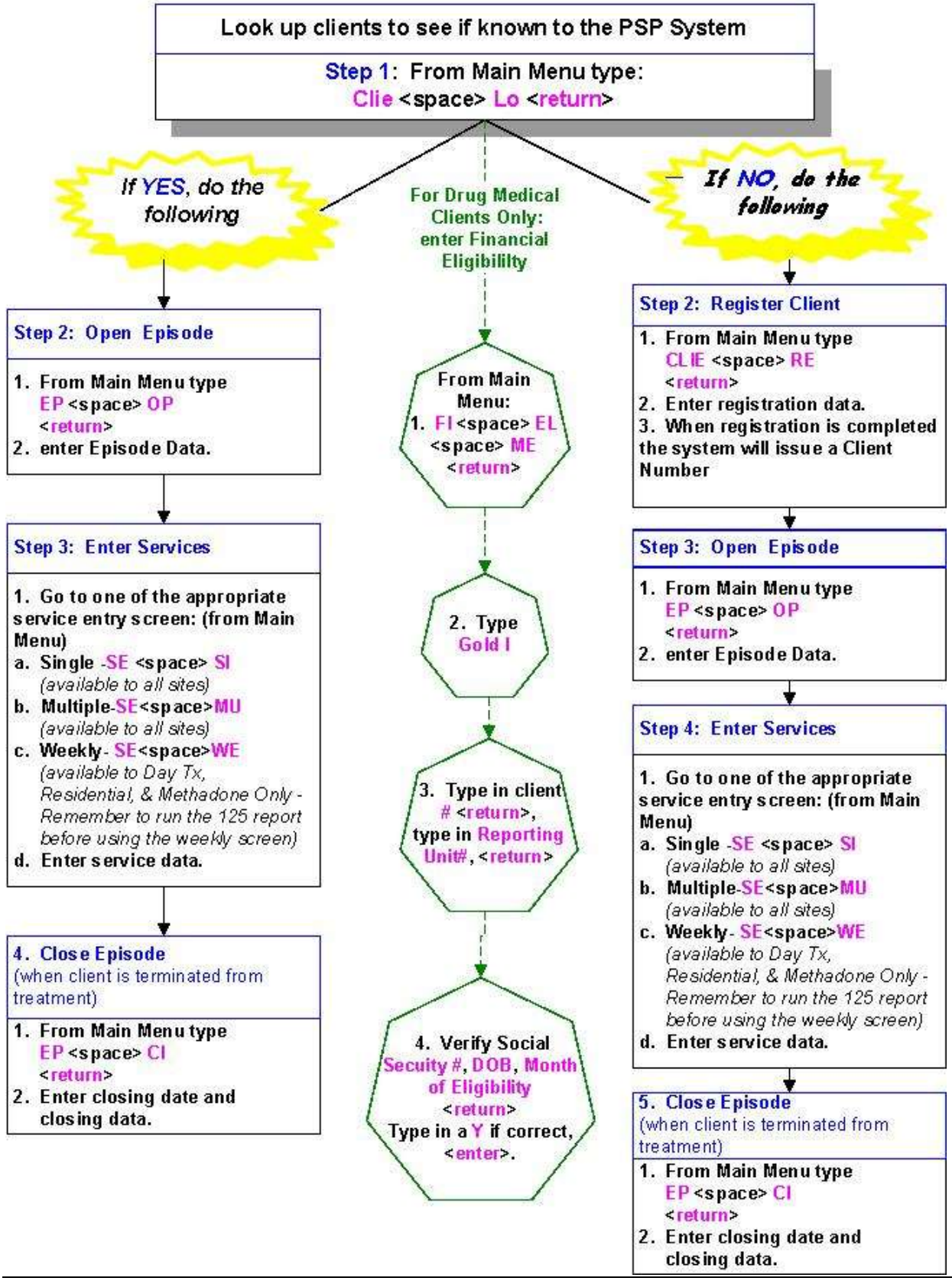
Logging Off the Computer

To log out of INSYST, enter the word "Exit" on the command line of any menu.

Never exit the Internet Explorer Window until you have seen a message confirming that you are logged off INSYST. The message includes your name, the date and time that you log off the computer.

Make sure you **LOGOFF** the Web Portal **BEFORE** closing the Internet Explorer Window.

INSYST Flow Chart for AOD Providers



Client Information

Chapter 2
Basic Client Information

The Client Number

Before you can work with any client information, the client must have a client number. If a client is new to your program, you must determine whether the client has a number, by using the Client Locator screen, described below. If you cannot find the client number, assign a new client number using the Client Registration Screen, described later in this chapter.

Locating Clients

The Client Locator Screen lets you find out if someone has ever been a client and lets you display information about clients

To use the Client Locator Screen:

1. Choose CLIENTS from the Main Menu.
2. Choose LOCATOR from the Client Maintenance menu to display the Client Locator screen (Figure 2.1).

TIP: ***From the Main Menu "1 7" is a great Menu Short Cut to the Client Locator Screen.***

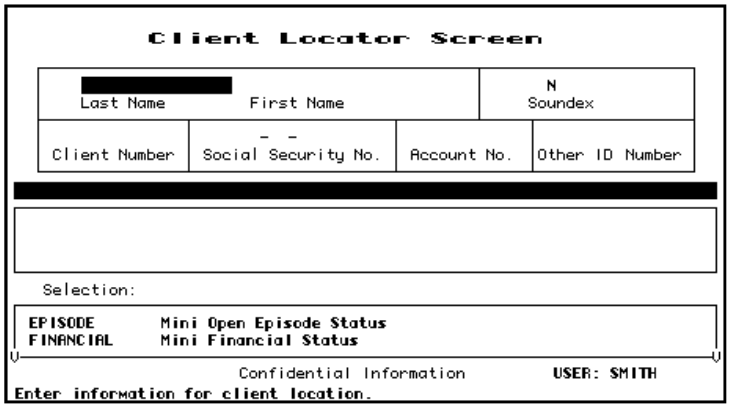


Figure 2.1: Client Locator Screen

Client Information Area

The top section of the screen is the Client Information Area, where you enter criteria to search for a client, and where information is displayed when the client is found.

Note: Before registering a new client, be sure you have tried all possible spellings of the client's name and aliases. Press Num Lock (Gold)-R to restart the screen and search with other spellings of the client's name. If necessary, press Num Lock (Gold)-A before doing the new search, so the list is not limited to 8 names.

To search for a client:

1. Make an entry in one or more fields of the Client Information Area.
2. Press Return at any time to search for a client matching the information you have entered.

The Client Information Area has the following fields:

- **Client Name:** Enter the client's full name or only the first few letters of the client's name. For example, if you enter "And" as the last name, you will find clients with the names Anders, Anderson, Andrews, *etc*.
- **Client Number:** If you know the Client Number, the fastest way to look up the client is to press Num Lock (Gold)-C to move to the Client Number field and enter the client's number.
- **Social Security Number:** If you do not have a Client Number, the Social Security Number is the fastest way to find the client. If you have the client's Social Security Number, press the Tab key to skip the other fields and enter the SSN here. You do not need to enter "-" between the numbers.

Note: If you enter the Social Security Number and Client Name, the computer searches on the Social Security Number and returns the client information if it finds a match. This may not be the client name you have entered, if another client has used that Social Security Number. If there is no match on Social Security Number, the search is based on name.

Note: All SUD (Substance Use Disorder) programs must follow the data collection protocols as detailed in the CalOMS Data Collection guide found on the CalOMS page of the BHCS Provider Website: www.acbhcs.org/providers

If there is an exact match, all fields on the top half of the screen are filled with information about the client (Figure 2.2).

If there is no match, the system displays the message: Client/Clients not found.

If there are several possible matches, they are listed in the Client Selection Area of the screen, described below.

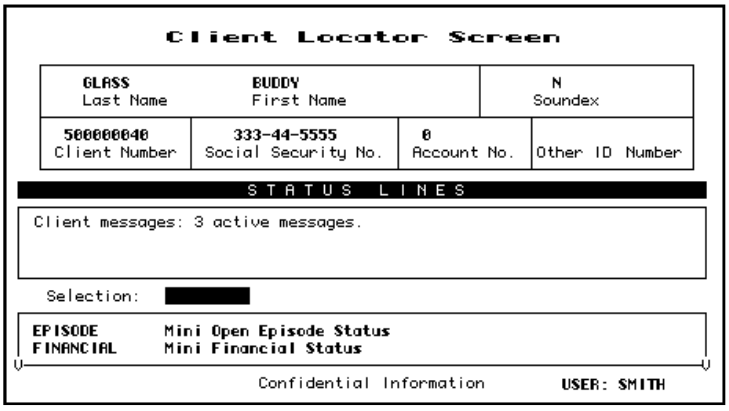


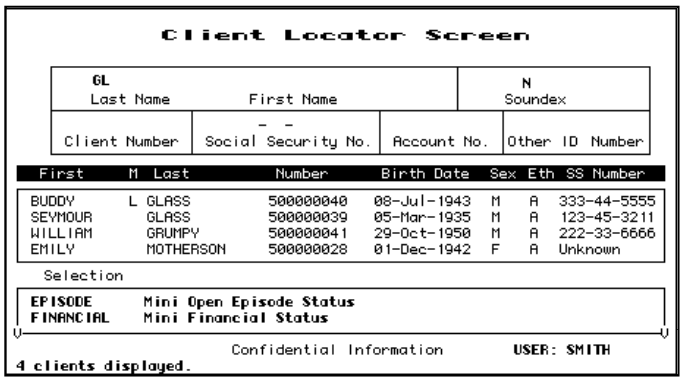
Figure 2.2: An Exact Match in the Client Information Area

Client Selection Area

The second section of the screen is the Client Selection Area. If there is more than one possible match, records beginning with the first possible match are listed alphabetically here (Figure 2.3).

To use the Client Selection Area:

1. Move through the list using the methods described in the section on Moving Through Lists in Chapter 1.



2. Type "X" next to the client you want, and press Return. Data on that client is displayed in the Client Information Area.

You can select multiple clients on a page by putting "X" next to each, and then pressing Return. Then you display data on them by using the Previous and Next options in the Menu Selection Area (described below).

Aliases are displayed in the Client Selection Box with an asterisk (*) next to the name. They are selected like other names in the list, but the computer displays the client's real name in the Client Information Area.

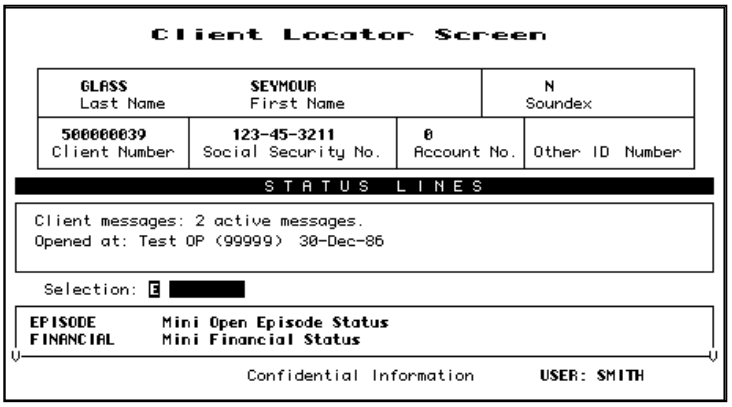
If you find the target client in this list, note the client number, so you can use it to work with the client. If you do not find the target client, you must register the client into the system.

- **Num Lock (Gold)-F: (Face Sheet)** request the menu to select Face Sheets, and then press **F6** to complete the request. The Face Sheet is placed in your printer queue ready to print.

Menu Selection Area

The lowest portion of the Locator screen is the Menu Selection Area, where you can enter commands to find more information on the client who is displayed in the Client Information Area.

As with any INSYST menu, you may select a menu item by entering the first letters of your menu choice (For Example, Figure 2.4 illustrates the choice of "E" for Episodes), or by using Tab key to move to the item you want and typing an "X" next to it.



The menu gives you the following options:

- **EPISODE Mini Open Episode Status:** Gives you a short listing of all programs (or reporting units) at where the client is currently admitted.
- **FINANCIAL Mini Financial Status:** Displays current account information and charges for the client.
- **STATUS Client Status Summary Report:** Takes you to the Client Status Summary Report Screen, which displays the client's current open episodes, closed crisis episodes, and current account information.
- **NEXT Display Next Client:** If you selected multiple clients in the Client Selection Area, this option will display data on the next one in the Client Information Area.
- **PREVIOUS Display Previous Client:** If you selected multiple clients in the Client Selection Area, this option will display data on the previous one in the Client Information Area.

Some of these options display data in the same area that you used for client selection, as you can see in Figure 2.4, where message status is displayed there.

Registering a New Client

If you cannot find new clients using the Client Locator Screen, you must register them to give them client numbers before you can open episodes and enter services for them.

To register a client:

1. Choose CLIENTS from the Main Menu.
2. Choose REGISTER from the Client Maintenance Menu to display the Client Registration screen (Figure 2.5).

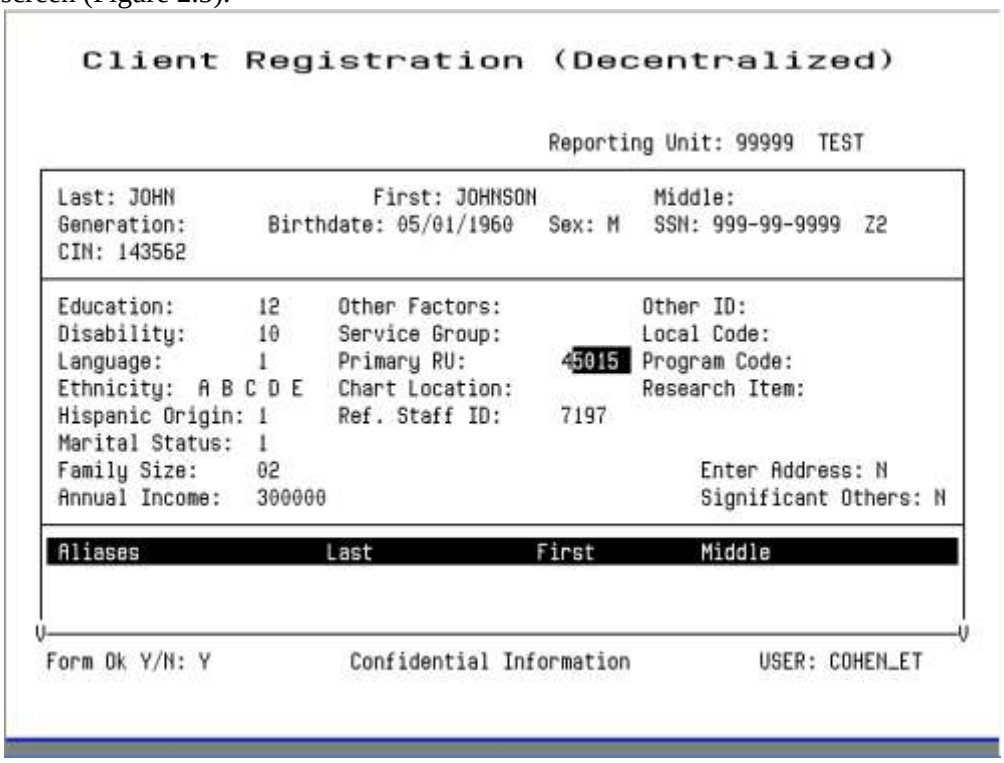

Client Registration (Decentralized)
Reporting Unit: 99999 TEST
Last: JOHN First: JOHNSON Middle:
Generation: Birthdate: 05/01/1960 Sex: M SSN: 999-99-9999 Z2
CIN: 143562
Education: 12 Other Factors: Other ID:
Disability: 10 Service Group: Local Code:
Language: 1 Primary RU: 45015 Program Code:
Ethnicity: A B C D E Chart Location: Research Item:
Hispanic Origin: 1 Ref. Staff ID: 7197
Marital Status: 1
Family Size: 02 Enter Address: N
Annual Income: 300000 Significant Others: N
Aliases Last First Middle
Form Ok Y/N: Y Confidential Information USER: COHEN_ET

Figure 2.5: Client Registration Screen

Note! Because the information entered in the Client Registration screen establishes the client's identity, it is best to ask the client for a Driver's License, Social Security Card, or other document and copy the information from it. Three critical pieces of information must be entered correctly: client name, birth date, and Social Security Number.

3. Enter data in the following fields:

- **RU:** Enter the Reporting Unit Number for the program where you are registering the client. This field establishes whether you are using decentralized or centralized registration. With decentralized registration, the system automatically assigns a client number and you can enter episodes and services for the client. With centralized registration, you can register a client and enter episodes, but you cannot to enter services until the registration has been evaluated by a central registration auditor. After you have entered the Reporting Unit, the screen title changes to Client Registration (Centralized) or Client Registration (Decentralized).
- **Last Name:** Enter a last name with up to 16 letters. Leave out apostrophes, dashes and blank spaces. For example "O'Connor" should be typed "OCONNOR".
- **First Name:** Enter a first name with up to 12 letters.

- **Middle Initial:** Enter one letter as a middle initial, or press the Tab key or space bar to skip this field if there is no middle initial.
- **Client Generation:** Enter a generation title that is part of the client's name, such as Jr., Sr., or the Roman Numerals II, III, *etc*.
- **Birthdate:** Enter the birth date in MM/DD/YYYY format.
- **Sex:** Enter "F" for female, "M" for male, or "U" for unknown, or "Z3" for other
- **Social Security Number:** Enter a nine-digit Social Security Number. It is best to copy this key information directly from the client's Social Security Card if possible. If the client does not have one, enter all 9's in this field. Enter "Z0", "Z2" or "Z4" in the field to the right of SSN, if Social Security Number is all 9's.
- **Client Index Number:** Enter a nine-digit Client Index Number.
- **Education** Enter the number of the highest grade completed. For example, if the client has completed high school, enter "12". If the highest grade is greater than 20, enter "20". Enter "Z0" or "Z4" if client declined to state or unable to answer.
- **Disability** Add the number codes for all of the client's physical disabilities, and enter the total in this field. InSyst's standard disability codes are listed in Appendix C of this manual, but your local agency may use different codes. Add the number codes for all of the client's physical disabilities, and enter the total in this field. Enter "Z0" or "Z4" if client declined to state or unable to answer.
- **Language** Enter the code for the language the client prefers to speak, as reported by the client. InSyst's standard language codes are listed in Appendix C of this manual, but your local agency may use different codes.
- **Ethnicity** Enter up to five (5) Ethnicity codes. The codes are listed on the Client Registration form.
- **Hispanic Origin**: Enter the appropriate Hispanic Origin as reported by the client. The codes are listed on the Client Registration form.
- **Marital Status:** Enter the Marital Status code. InSyst's standard codes are listed in Appendix C, but your agency may use different codes. (Note that Code 1, Never Married, is used for a single person who does not live with girlfriend/boyfriend and has never been married.)
- **Enter Address:** This is not a data field; it is a question. The system is defaulted with "Y", the system will jump to the Address Screen, described later in this chapter. Once you are done with that screen, the system will return you to the Registration Screen.
- **Enter Significant Other:** This is not a data field; it is a question. The system is defaulted with "N", the system will jump to the Significant Other Screen when set to "Y", described later in this chapter. Once you are done with that screen, the system will return you to the Registration Screen.
- **Aliases:** If the client has ever used aliases, enter them here. As you add information, this section of the screen scrolls upward to allow more information to be entered. You may enter up to six aliases via the Client Registration Screen, and enter more through the Client Maintenance screen if necessary.
- **Birth Last Name:** Enter a last name with up to 16 letters. Leave out apostrophes, dashes and blank spaces. For example "O'Connor" should be typed "OCONNOR".

- **Birth First Name:** Enter a first name with up to 12 letters or enter "Z2".
- **Birth County:** Enter Clients' birth county or "Z3".
- **Birth State:** Enter Clients' birth state or "Z3".
- **Mother's First Name:** Enter a first name with up to 12 letters.
- **Driver's license Number:** Enter Client's driver's license number or "Z0", "Z2", "Z4".
- **Driver's license State:** Enter Client's driver's license state or "Z0", "Z2", "Z4".

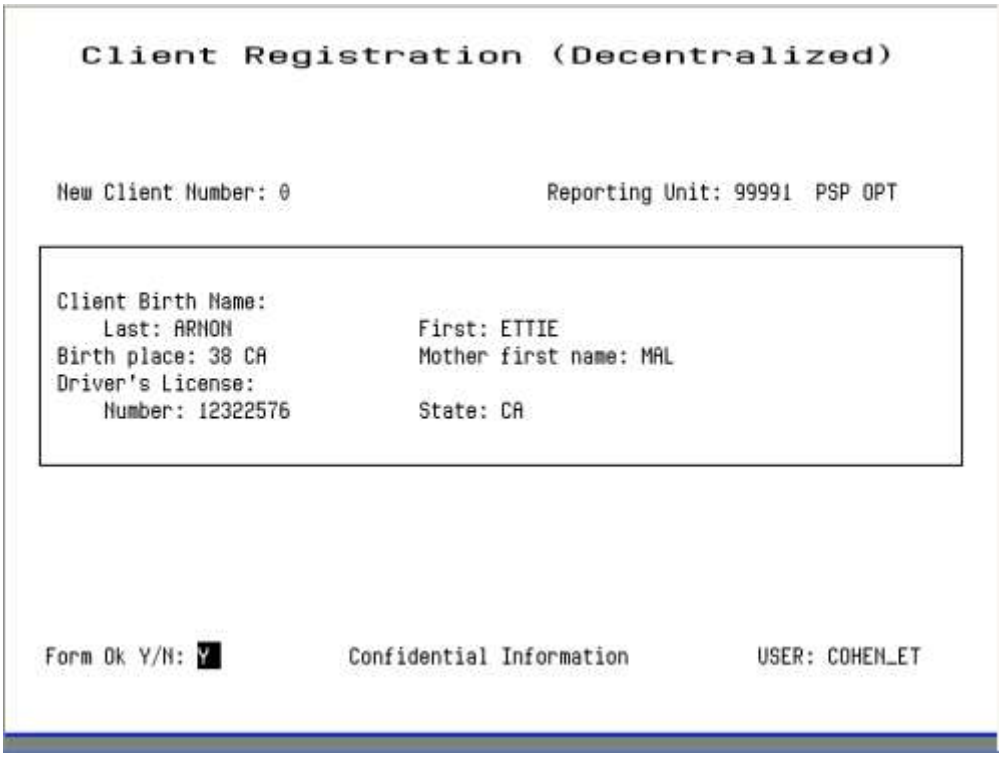


Figure 2.6: Client Registration Screen after Registering a Client

Error Messages

If there is a Social Security Number in the system that is the same as the one you just entered, it displays an error message and it does not let you continue. If you're sure that the number you have entered is correct, refer the case to your supervisor.

If there is a client in the system with the same name and birth date you have just entered, it displays an error message and does not let you continue. Refer the case to your supervisor.

If two different clients do have the exact same name and birth date, a supervisor may use the Num Lock-A sequence to override the match, so registration can occur. You cannot override a Social Security Number match.

Maintaining Client Records

To maintain client records:

1. Choose CLIENTS from the Main menu.
2. Choose MANAGEMENT from the Client Maintenance Menu to display the Client Maintenance Screen (Figure 2.7).
3. Use the fields at the top of the screen to identify the client and maintenance type:

- **Client Number:** Enter the number of the client whose record you want.
- **Maintenance Type:** If the client number is valid, you can enter the Maintenance Type "L" (for Lookup) or "U" (for Update).

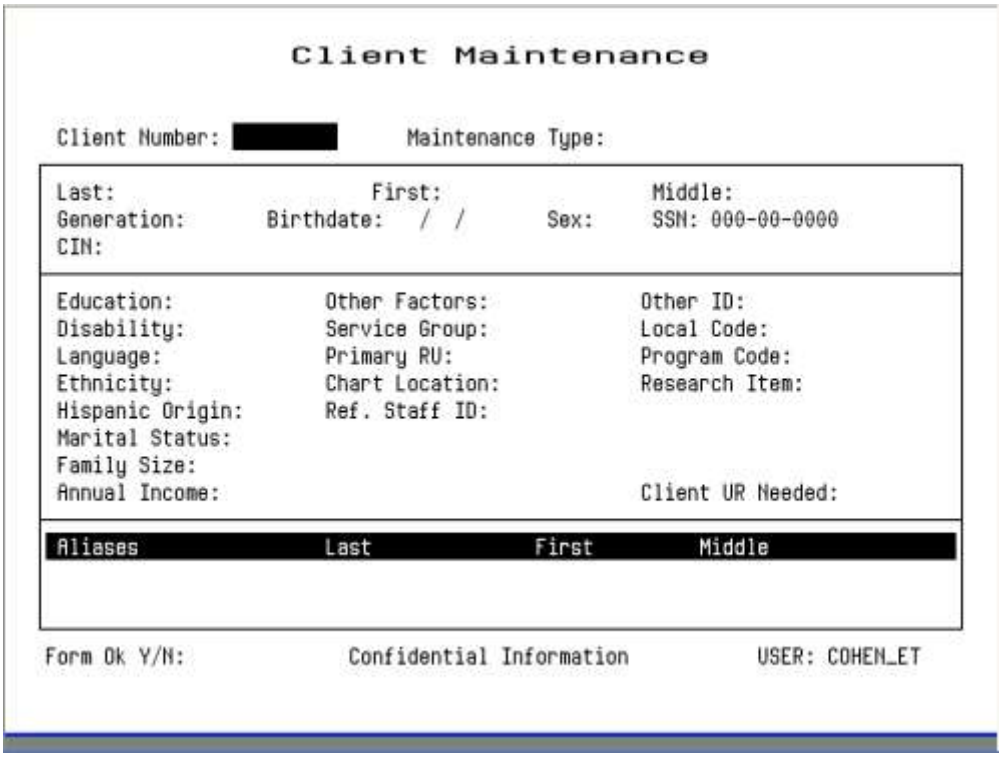
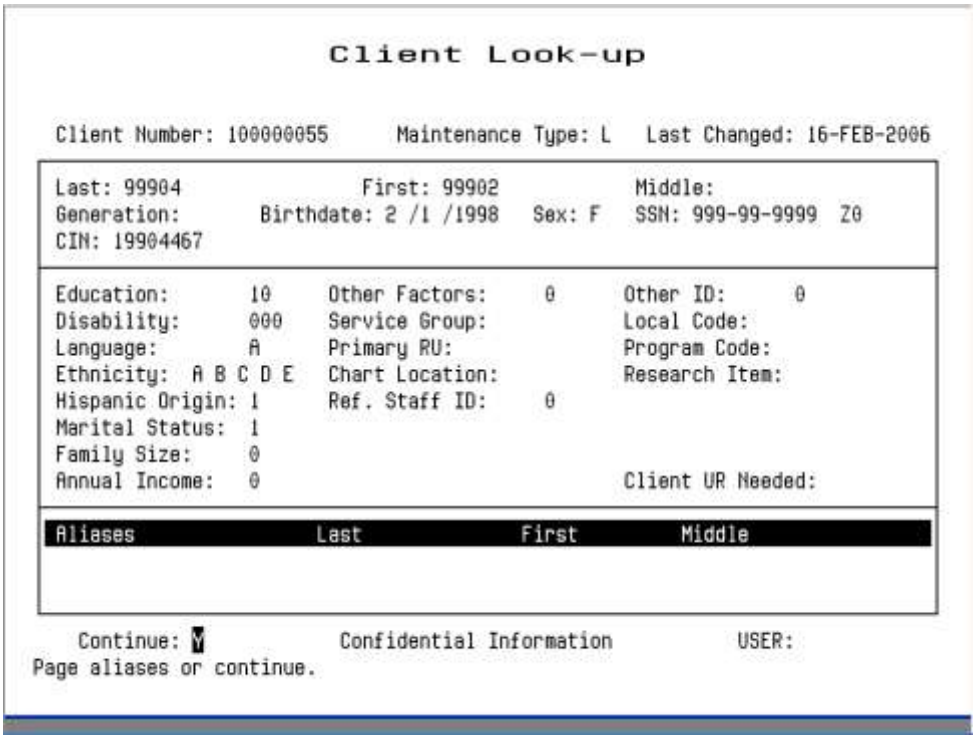


Figure 2.7: Client Maintenance Screen

Client Lookup

If you enter "L", InSyst displays the Client Lookup Screen (Figure 2.8). This screen only lets you view information, and so it can be used by people who are not authorized to change client information.


Client Look-up
Client Number: 100000055 Maintenance Type: L Last Changed: 16-FEB-2006
Last: 99904 First: 99902 Middle:
Generation: Birthdate: 2 /1 /1998 Sex: F SSN: 999-99-9999 Z0
CIN: 19904467
Education: 10 Other Factors: 0 Other ID: 0
Disability: 000 Service Group: Local Code:
Language: A Primary RU: Program Code:
Ethnicity: A B C D E Chart Location: Research Item:
Hispanic Origin: 1 Ref. Staff ID: 0
Marital Status: 1
Family Size: 0
Annual Income: 0 Client UR Needed:
Aliases Last First Middle
Continue: Y Confidential Information USER:
Page aliases or continue.

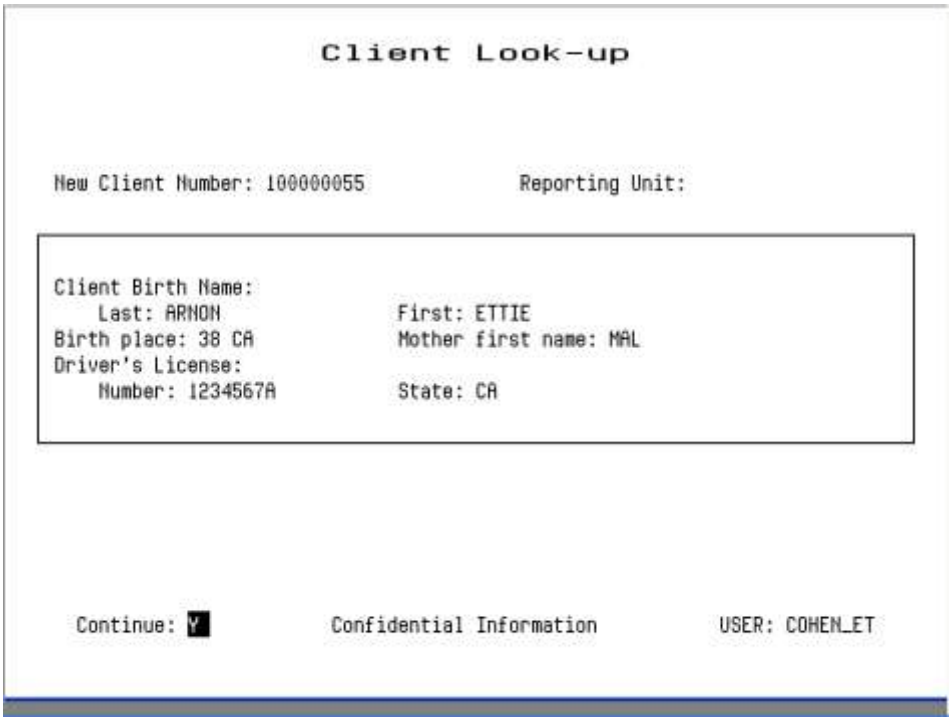

Client Look-up
New Client Number: 100000055 Reporting Unit:
Client Birth Name:
Last: ARNON First: ETTIE
Birth place: 38 CA Mother first name: MAL
Driver's License:
Number: 1234567A State: CA
Continue: Y Confidential Information USER: COHEN_ET

Figure 2.8: Client Look-up Screen

If the client has aliases listed, you may use Num Lock key sequences to page through them, as described in the section on Moving Through Lists in Chapter 1.

When you are done, enter "Y" to continue looking up more clients, or press Num Lock-S to leave the Maintenance Screen and save the client number, so it is entered automatically in the next screen you use.

Client Update

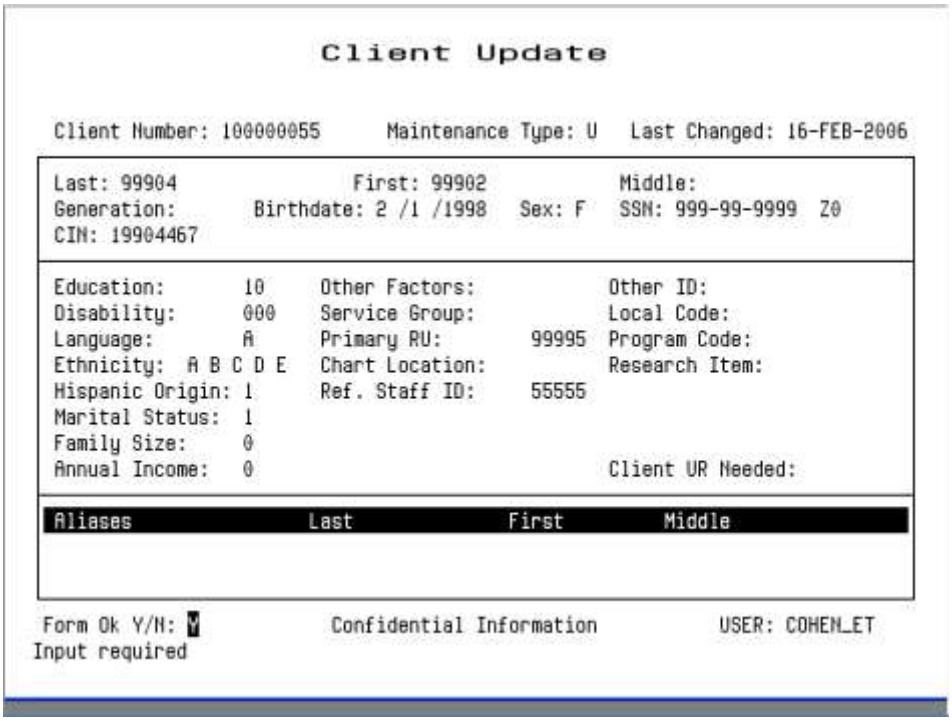
If you enter "U", InSyst displays the Client Update Screen (Figure 2.10).

To modify client data:

1. Press Tab to move through the fields, and edit them as necessary.
2. Tab to the Form OK prompt, and enter "Y" to save the changes, or "N" to discard them.

The data in all these fields was described in the section on the Client Registration Screen, earlier in this chapter.

The Client Number cannot be changed.


Client Update
Client Number: 100000055 Maintenance Type: U Last Changed: 16-FEB-2006
Last: 99904 First: 99902 Middle:
Generation: Birthdate: 2 /1 /1998 Sex: F SSN: 999-99-9999 Z0
CIN: 19904467
Education: 10 Other Factors: Other ID:
Disability: 000 Service Group: Local Code:
Language: A Primary RU: 99995 Program Code:
Ethnicity: A B C D E Chart Location: Research Item:
Hispanic Origin: 1 Ref. Staff ID: 55555
Marital Status: 1
Family Size: 0
Annual Income: 0 Client UR Needed:
Aliases Last First Middle
Form Ok Y/N: Y
Confidential Information
USER: COHEN_ET
Input required

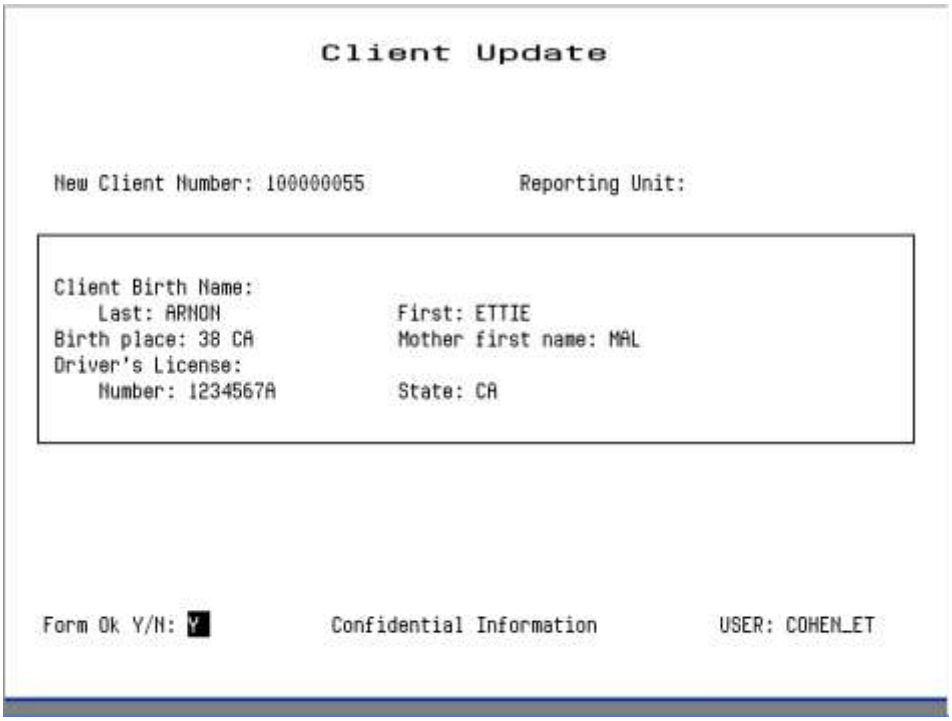


Figure 2.10: Client Update Screen

The Registration Approved field only applies to systems using centralized registration, and it can only be changed by the Central Registrar. The Client UR Needed field can only be changed by authorized staff.

Aliases cannot be changed, but any user can add new aliases or can delete an alias by entering "D" on its line.

Client Last Name, First Name, Middle Initial, Social Security Number, Birthdate, and Sex can only be changed by a Supervisor. If you are authorized as a supervisor, you can press Num Lock-A to display the Client Update Screen in Supervisor mode (Figure 2.11).

Note: If the client has aliases listed, you may use Num Lock (Gold) -M key sequences to page through them, as described in the section on Moving Through Lists in Chapter 1.

Entering a New Client Address

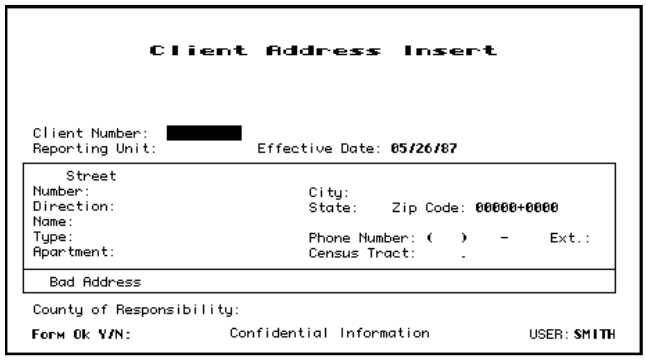
Any authorized user can enter a new address for a client with an open episode.

Note: INSYST goes directly to this screen when registering a new client.

To enter a new address:

1. Choose ADDRESS from the Client Maintenance Menu to display the Address Maintenance Selection Screen, as described above.
2. Press Num Lock (Gold)-I (I stands for Insert) to display the Client Address Insert Screen
3. Enter data in the following fields:

- **Client Number:** Enter the number for the client whose address you want to enter. If you are already viewing a list of the client's addresses when you press Num Lock (Gold)-I, the Client Number is entered automatically.
- **Reporting Unit:** Enter the Reporting Unit Number for the program that has an open episode for the client. The Effective Date of the address you are entering must fall within this episode.
- **Effective Date:** By default, the Effective Date is today's date. Only Supervisors can alter it.
- **Street Number:** Enter a street number with up to five (5) digits.
- **Street Direction:** If the address has one, enter a street direction, such as "N", "NE", "E", "SE", "S", "SW", "W", "and NW".



- **Street Name:** Enter a street name with up to twenty characters. (Do not enter "Street", "Road", or other street type here.) Enter "**Homeless"** as a street name if the client is Homeless.
- **Street Type:** Enter an abbreviation for the street type, such as "ST", "BL", "RD", and "AV".
- **Apartment/Unit/Space #:** Enter up to four characters. Do not enter the symbol "#", and do not enter a period at the end.
- **City:** Enter a city name with up to twenty characters. Enter a city name even if the client is **Homeless**. Enter the **Zip Code +4** for the **City Hall** of the city where the client indicates they most often sleep (in a shelter or on the street).
- **State:** Enter the two letter abbreviation for the state name.
- **Zip Code:** Enter the Zip Code +4, and the cursor moves to the plus-four digits, which you can enter if available.

- The **CITY, STATE AND ZIP CODE** MUST match or the system will NOT ALLOW ENTRY. Another requirement is that ZIP+4 now MUST be INCLUDED in the ZIP CODE. This change is a requirement of the Medi-Cal program and HIPAA was effective January 1, 2012. ALL REJECTED SERVICE CLAIMS WILL BE SENT BACK TO THE PROGRAM FOR ZIP CODE +4 CORRECTIONS.

Note:

City names MUST be spelled correctly or the system will give an error message

- **State** abbreviation must be same as the state which the city is located
- **Zip Code** must be the valid zip code (for the city and state) and include the **+4** for the address entered.
- **Homeless:** Enter the **Zip Code +4** for the **City Hall** of the city where the client indicates they most often sleep (in a shelter or on the street).

City Hall +4 Zip Codes use for Homeless Client Address

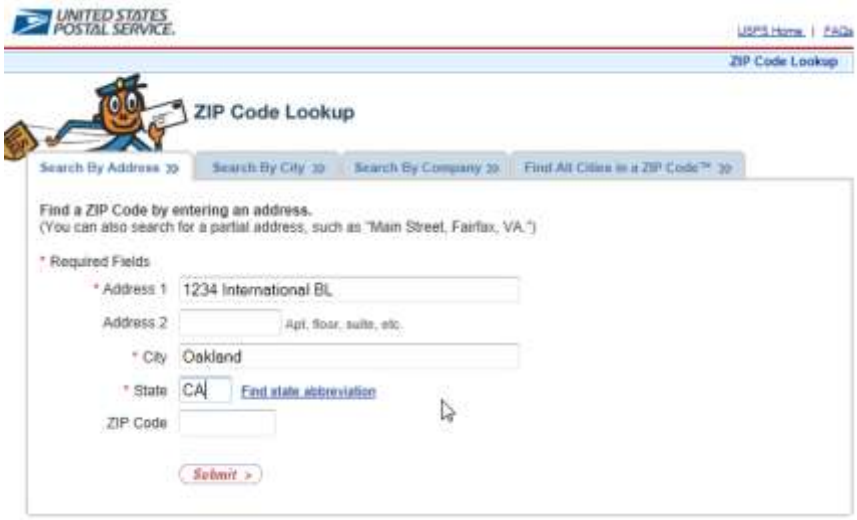
Alameda	**94501-4477**	**Albany**	**94706-2226**
Berkeley	**94704-1122**	**Castro Valley**	**94546-5878**
Dublin	**94568-2658**	**Emeryville**	**94608-3517**
Fremont	**94538-1514**	**Hayward**	**94541-5007**
Livermore	**94550-4813**	**Newark**	**94560-3727**
Oakland	**94612-1904**	**Piedmont**	**94611-4031**
Pleasanton	**94566-7016**	**San Leandro**	**94577-3729**
San Lorenzo	**94580-2453**	**Sunol**	**94586-9509**
Union City	**94587-4452**		

ZIP CODE +4

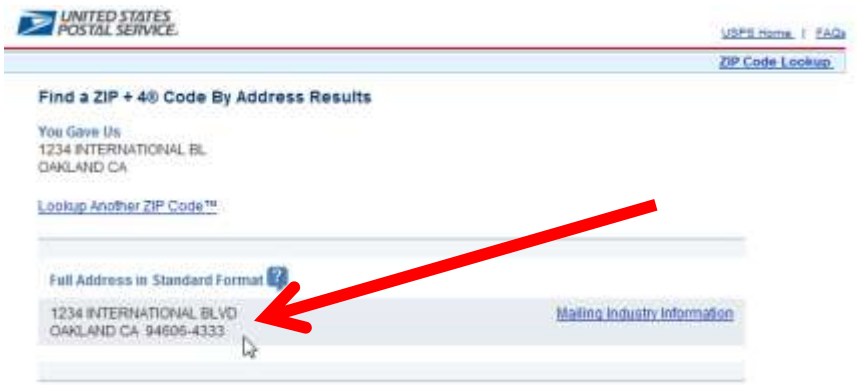
The Zip Code +4 can be found on the USPS website:

http://zip4.usps.com/zip4/welcome.jsp

Enter the address on the first screen and click submit.



Address is displayed with Zip Code +4 on the second screen.



- **Phone Number:** Enter the telephone number, if available. If you do not want to enter the Area Code, you must type three blank spaces in its place.
- **Extension:** Enter an extension for the telephone number, if there is one.
- **County of Responsibility**: If you do not make an entry here, INSYST will use your county's code when it reports to state client data systems. To report to the state that another county is responsible, enter the two-digit county code in this field. (This section is generally used by California Mental Health Programs.)

4. Enter "Y" at the Form OK prompt to validate and save the data.

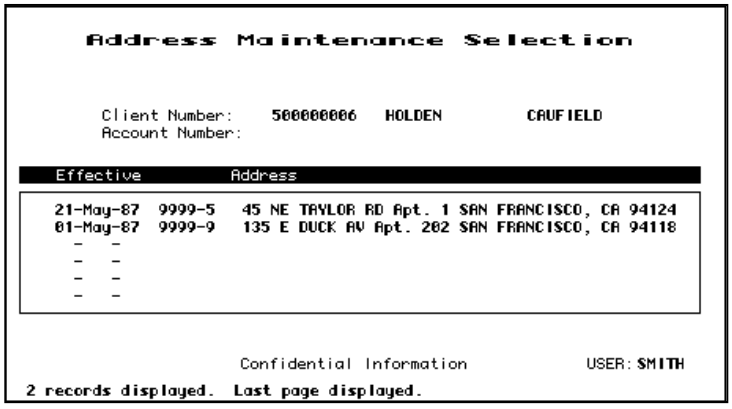
Maintaining Addresses

The Address Maintenance Selection screen is used to maintain either Client addresses or Account Addresses, the addresses that bills are sent to.

To maintain addresses:

1. Choose ADDRESS from the Client Maintenance Menu to display the Address Maintenance Selection Screen, as described above.
2. Use the fields at the top of the screen to display a list of addresses:
   - **Client Number:** Enter a Client Number to display that client's addresses.

The screen lists all addresses for the client or account (Figure 2.12), with the most recent listed first.


Address Maintenance Selection
Client Number: 500000006 HOLDEN CAUFIELD
Account Number:
Effective Address
21-May-87 9999-5 45 NE TAYLOR RD Apt. 1 SAN FRANCISCO, CA 94124
01-May-87 9999-9 135 E DUCK AV Apt. 202 SAN FRANCISCO, CA 94118
Confidential Information
USER: SMITH
2 records displayed. Last page displayed.

3. Move through the list using the methods described in the section on Moving Through Lists in Chapter 1. Select address records to maintain by typing "L" (lookup), "U" (update), or "D" (delete) next to them. When you have finished selecting records, press Return.

Client Address Lookup

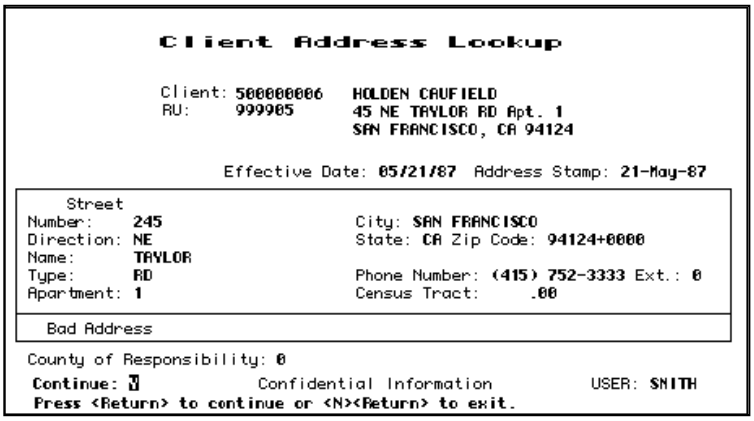
If you entered a Client Number and entered "L" next to the address, it is displayed in the Client Address Lookup screen (Figure 2.13). You cannot change the data. Press Return to display the next address, or press "N" and Return to exit.

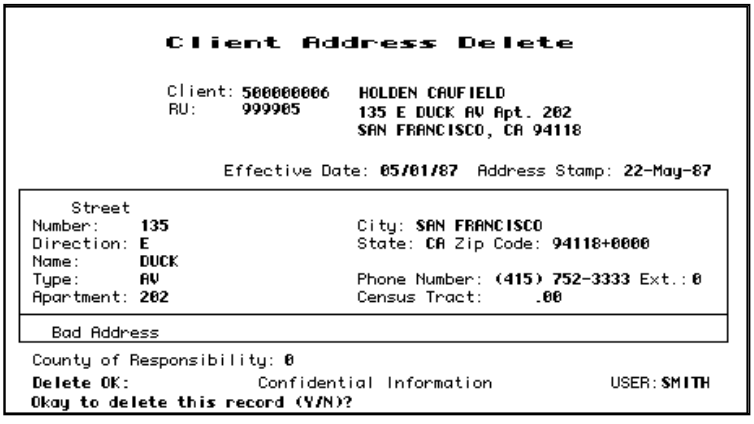
Client Address Delete

If you entered a Client Number and entered "D" next to the address, it is displayed in the Client Address Delete screen (Figure 2.14). Enter "Y" at the Delete OK prompt and "Y" again at the CONFIRM prompt to delete the address.

Client Address Update

If you entered a Client Number and entered "U" next to the address, it is displayed in the Client Address Update screen (Figure 2.15).





You can change most of its data. However, you cannot change the Client Number, the Reporting Unit, the Effective Date, or the Address Stamp (which shows when the Address was entered). Because you cannot change the Reporting Unit, if the wrong program has been entered for an address, you must delete the record and enter a new one.

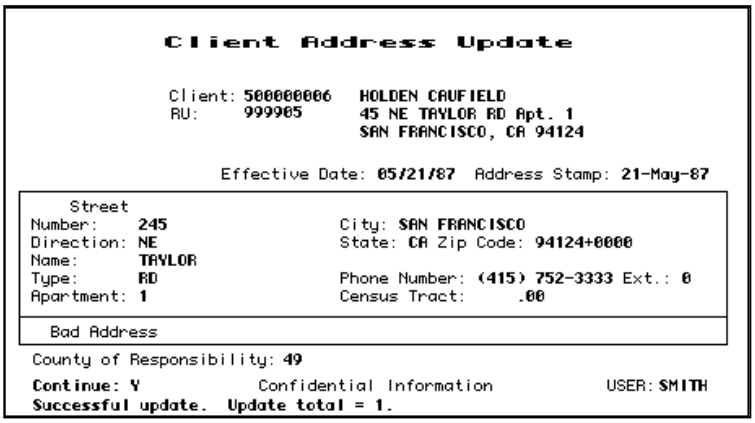


Figure 2.15: Client Address Update Screen

When you have made all changes, press Return. The next record you selected to maintain is displayed. If there are no more selected records, you return to the Address Maintenance Selection Screen.

Chapter 3
Client Episodes

An Episode is a period of treatment for a client at a program. Before you can enter services for a client, there must be an open Episode for the client in the program providing the service.

Opening New Episodes, Substance Abuse Programs

Before services for a client can be entered into the system, an Episode must be opened.

To open an episode:

1. Choose EPISODES from the Main Menu.
2. Choose OPEN from the Episode Maintenance Menu to display Panel 1 of the Episode Opening Screen (Figure 4.14).

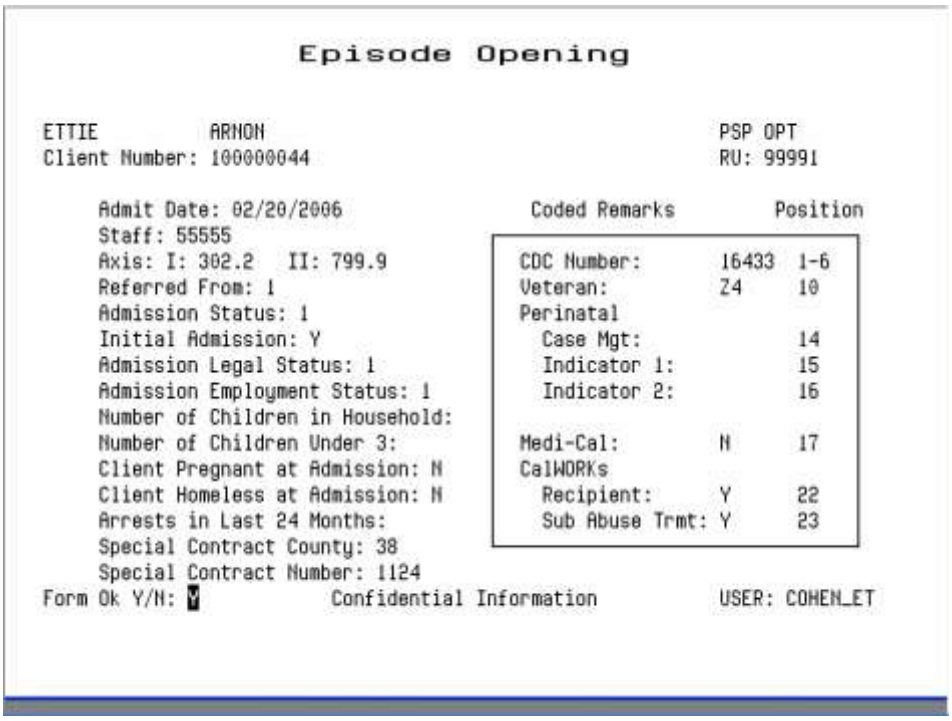


Figure 4.14: Episode Opening Screen, Panel One

3. Use the fields at the top of this panel to identify the record:

- **Reporting Unit:** Enter the reporting unit number for your program.
- **Client Number:** Enter the client number. If necessary, use the Client Locator Screen, described in Chapter 2, to find the correct client number.

4. The system does not let you open an episode, if the client already has an open episode at this reporting unit. After the identifying fields are validated, you enter data in the following fields:

- **Admit Date:** Enter the admission date. The current date is the default. You cannot enter future dates or dates when the program is not open.
- **Staff:** Enter the primary staff identification number.
- **Diagnosis I and II:** Enter codes for the primary and secondary diagnoses. The default for Diagnosis II is No Diagnosis, code 799.9. See the back of the Episode form for the most common codes.
- **Referred From:** Enter the referral code. You can enter a Reporting Unit number, an Agency Code, or a generic code to indicate self or other or a type of local agency. Ask your system manager about these codes.
- **Admission Status:** Enter the client's Admission Status using the codes in Table 4.3. (Categories 2 through 6 are considered Co-Dependents.)

Code	Meaning
1	Substance Abuser
2	Spouse of Substance Abuser
3	Adult Child of Substance Abuser
4	Minor Child of Substance Abuser
5	Parent of Substance Abuser
6	Other Co-Dependent of Substance Abuser

Table 4.3: Admission Status Codes

- **Initial Admission:** If this is the first time the client has ever been to a Substance Abuse program, enter "Y". If this is a transfer from another program, enter "N".
- **Admission Legal Status:** Enter the client's legal status, using the codes in Table 4.4.
- **Employment Status:** Enter the client's current employment status. Ask your system manager for a list of these codes.
- **Client Is Currently Pregnant:** Enter "Y" or "N" to indicate whether the client is pregnant. Enter "N" if the client is male.
- **Current Living Situation (Homeless At Admission):** Enter "1" if Homeless, "2" if Dependant Living, "3" if Independent Living
- **# of Arrests in Last 24 Months:** Enter the number of times the client has been arrested in the last twenty-four months.
- **Special Contract County:** Enter CalOMS Special Contract County or enter "Z2".
- **Special Contract Number:** Enter the CalOMS Special Contract Number assigned by the state, if applicable or enter "Z2".
- **Coded Remarks:**
- **CDC Number:** Enter the client's California Department of Correction identification number or enter "Z0", "Z1", "Z2" or "Z4".
- **Veteran:** Enter "Y" if client is a U.S. veteran, "N" if not or enter "Z0" or "Z4".

- **Medi-cal Beneficiary:** Enter "Y" if client is Medical Beneficiary, "N" if not or enter "Z4".
- **CalWORKs Recipient:** Enter "Y" if client is CalWORKs recipient, "N" if not or enter "Z1".
- **CalWORKs Sub Abuse Treatment:** Enter "Y" if client is undergoing substance abuse treatment under CalWORKs, "N" if not or enter "Z1".
- **CalOMS Zip Code:**

  Enter the current zip code if the client is NOT homeless (Episode Opening Item #12 – Current Living Situation = "2" or "3".

  "00000" if client is homeless (Episode Opening Item # 12 – Current Living Situation = "1")

  "xxxxx" if client declines to state their zip code

  "zzzzz" if client is unable to give their zip code (client must be in a Detox Program or Client Registration Item # 8 includes "16 Developmentally Disabled")

- **# of Prior Admits to any substance abuse treatment program:** Enter a number from 0 to 9. If the client has been admitted to programs more than nine times, enter 9.
- **Medication Prescribed:** Enter the medication prescribed to this client. The codes are 1 = None, 2 = Methadone or LAAM, 3 = Other.
- **Has This Client Used Needles During the Past Year:** If the primary or secondary route of administration is by injection with a frequency of use Used in Past Year, you should answer this "Yes".
- **Problem - Primary, Secondary, Tertiary:** Enter the Primary, Secondary and Tertiary Problems, using the Substance Problem codes shown on the back of the Episode Opening/Closing/Annual Update forms or enter "Z1" or "Z3" (for Primary and Secondary only). For clients admitted for methadone treatment, the Primary Drug should be 01 or 15. You must use a different code for each problem. Secondary and Tertiary fields may be left blank..
- **Drug Name - Primary, Secondary :** Enter the Primary and Secondary drug name.

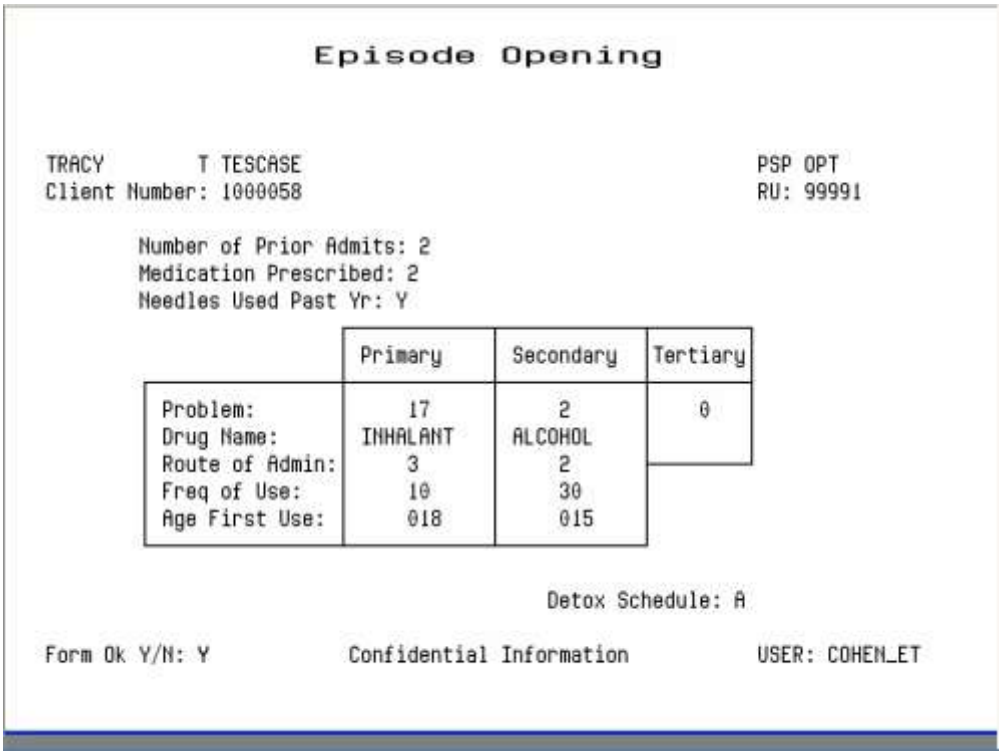


Figure 4.15: Episode Opening Screen, Panel Two

Table 4.5: Substance Problem Codes

- **Route of Administration - Primary & Secondary:** Enter the method that the client uses to administer the substances entered as Primary and Secondary Problems, using the codes shown in Table 4.6.

Code	Meaning
1	Oral
2	Smoking
3	Inhalant
4	Injection (IV or intramuscular)
5	Other/Unknown

Table 4.6: Route of Administration Codes

- **Frequency of Use:** Primary and Secondary: Enter the frequency of use for the substances. Allowed value 0 – 30 or "Z2". This field requires leading zeroes.
- **Age of First Use**: Primary & Secondary: Enter the age when the client first used the substances entered as the Primary and Secondary Problem. The age must be at least 5 years. This field requires leading zeroes.

- **Emergency Methadone Admission:** For Methadone Maintenance clients only, enter "Y" or "N" to indicate whether the client is being admitted as an exemption to methadone regulations. That is, the client would not be eligible for admission under the regular Title 9 criteria which specify a two year history of addiction and 2 prior treatment failures. **(ONLY USED BY METHADONE PROGRAMS)**
- **Detox Schedule:** For Methadone Maintenance clients only, enter a the number, 1 through 4, for the client's detox schedule, as defined by the program or county. **(ONLY USED BY METHADONE PROGRAMS)**

Note: For heroin detoxification programs, if a client has been open within 90 days preceding the opening date, the system will display an error message saying "Detox Hold". Only someone with supervisor authorization for Episodes may override this (by pressing Num Lock-A after entering the reporting unit and client number).

- **Alcohol Frequency:** Enter the number of days the client has used alcohol in the past 30 days. Allowed value is 0 – 30 or "Z2". This field requires leading zeroes.
- **IV Use:** Enter the number of days in which the client has injected in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4". This field requires leading zeroes.
- **Paid Days Work:** Enter the number of days the client has been paid for working in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4". This field requires leading zeroes.
- **Number of Arrests:** Enter the number of days the client has been arrested in the past 30 days. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Days in Jail:** Enter the number of days the client has been in jail in the past 30 days. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Days in Prison:** Enter the number of days the client has been in prison in the past 30 days. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Days of 12 Steps/Other:** Enter the number of days the client has participated in the following social support activities in the past 30 days.

  12 -Step Meetings
  Other Self Help Meetings
  Religious /Faith Recovery or Self-Help Meetings
  Attending Meetings of organizations other than those listed above
  Interactions with Family Member and/or Friend Support of Recovery

  Allowed value is 0 – 30. This field requires leading zeroes.
- **Days Living with Substance User:** Enter the number of days the client has lived with someone who uses alcohol or drugs in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4". This field requires leading zeroes.
- **Conflict Days with Family:** Enter the number of days the client has had a serious conflicts with family in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4". This field requires leading zeroes.
- **Emergency Room Visits:** Enter the number of days the client has used the emergency room for physical health problem in the past 30 days. Allowed value is 0 – 99 or "Z4". This field requires leading zeroes.
- **Hospital Overnights:** Enter the number of days in the client has stayed overnight in a hospital for physical health problem in the past 30 days. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Days of Physical Problem:** Enter the number of days in the client has experienced physical health problem in the past 30 days. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.

- **Outpatient Emergency Services:** Enter the number of days in the client has received outpatient emergency services for mental health needs in the past 30 days. Allowed value is 0 – 99 or "Z4". This field requires leading zeroes.
- **Hospital/Psychiatric Facility Visits:** Enter the number of days in the client has stayed form more than 24 hours in a hospital or psychiatric facility for mental health needs in the past 30 days. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Prescribed Medication Taken:** Has the client taken prescribed medication for mental health needs in the past 30 days? Enter Y, N or "Z4".

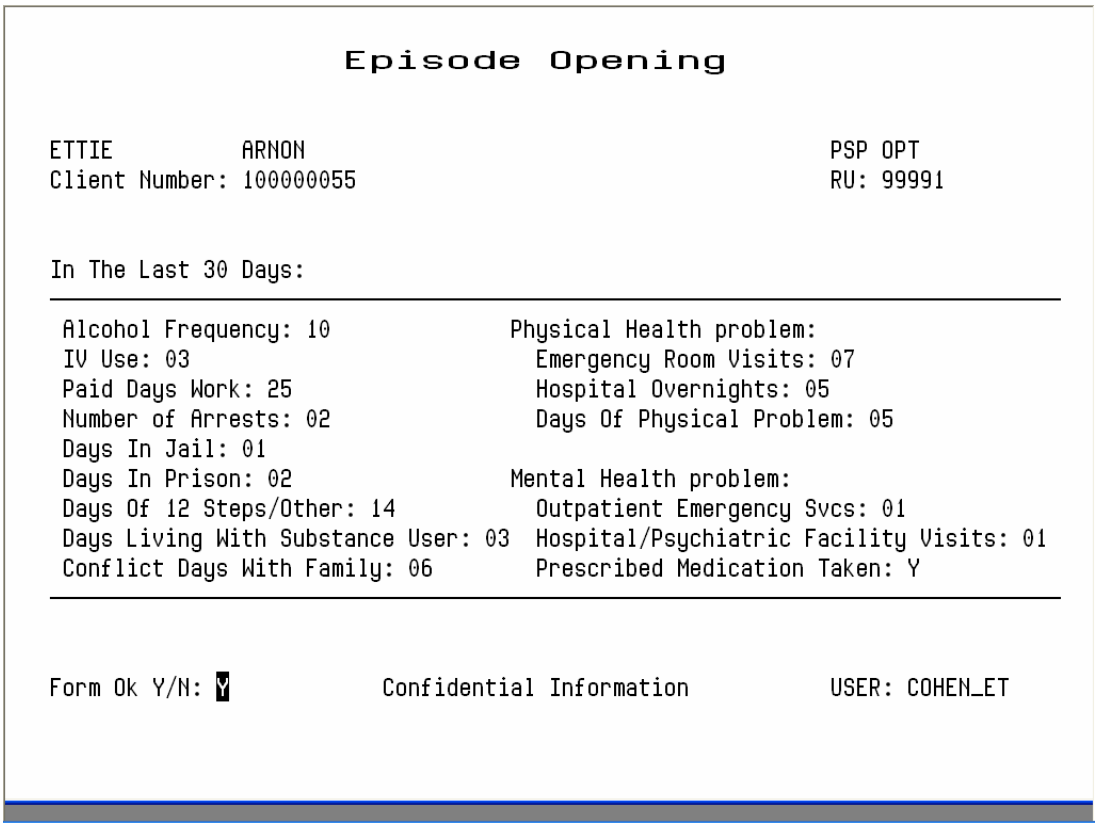


Figure 4.16 Episode Opening Screen, Panel 3

- **Consent for Future Contact:** Is there a consent form allowing future possible contact signed by the client on file within your agency? Enter Y or N.
- **Treatment Waiting Days:** Enter the number of days the client has been on a waiting list before being admitted to this treatment program. Enter a value between 0 – 999 or "Z1", "Z4". This field requires leading zeroes.
- **Enrolled in Job Training:** Is the client currently enrolled in a job training program? Enter Y, N or "Z0", "Z4".
- **Enrolled in School:** Is the client currently enrolled in school. Enter Y, N or "Z0", "Z4".
- **Diagnosed with Tuberculosis:** Has the client been diagnosed with Tuberculosis? Enter Y, N or "Z0", "Z4".
- **Diagnosed with Hepatitis C:** Has the client been diagnosed with Hepatitis C? Enter Y, N or "Z0", "Z4".

- **Diagnosed with sexually Transmitted Disease:** Has the client been diagnosed with a sexually transmitted disease? Enter Y, N or "Z0", "Z4".
- **Hiv/Aids Tested:** Has the client been tested for HIV/AIDS? Enter Y, N or "Z0", "Z4".
- **Hiv/Aids Result:** Does the client have the result of the HIV/AIDS test? Enter Y, N or "Z0", "Z4".
- **Prior Mh Diagnosis:** Has the client ever been diagnosed with mental illness? Enter Y, N or "Z1".
- **Children Aged 17 or Less:** Enter the number of children the client has, aged 17 or less. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Children Aged 5 or Less:** Enter the number of children the client has, aged 5 or less. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Children in CPS Placement:** Enter the number of children the client has who are living with someone else due to child protection court order. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Children in Placement with no Parental Rights:** Enter the number of children the client has who are living with someone else due to child protection court order AND for whom the client's parental rights have been terminated. Allowed value is 0 – 30 or "Z4". This field requires leading zeroes.
- **Parolee Services Network:** Enter "Y" if client is a parolee in the Parolee Services Network, "N" if not or enter "Z4".
- **FOTP Parolee:** Enter "Y" if client is a parolee in the Femal Offender Treatment Program, "N" if not or enter "Z4".
- **FOTP Priority Status:** Enter client's FOTP Priority Status. Allowed value is 1, 2, 3 or "Z2", "Z4".

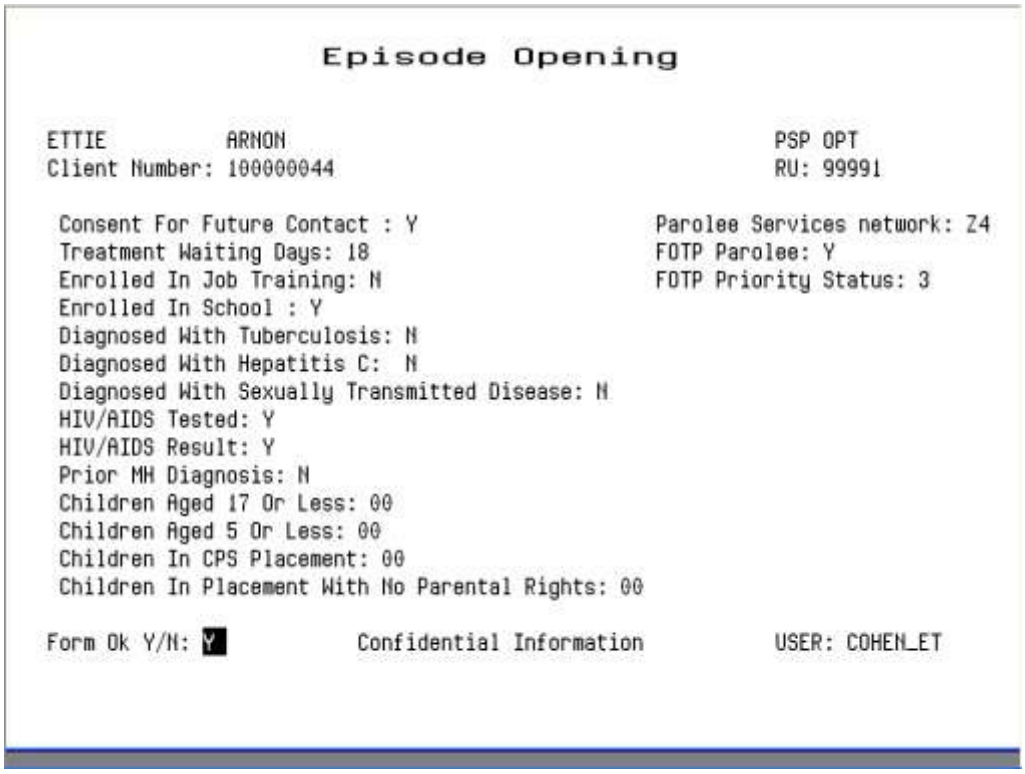

Episode Opening
ETTIE ARNON
PSP OPT
Client Number: 100000044
RU: 99991
Consent For Future Contact : Y
Parolee Services network: Z4
Treatment Waiting Days: 18
FOTP Parolee: Y
Enrolled In Job Training: N
FOTP Priority Status: 3
Enrolled In School : Y
Diagnosed With Tuberculosis: N
Diagnosed With Hepatitis C: N
Diagnosed With Sexually Transmitted Disease: N
HIV/AIDS Tested: Y
HIV/AIDS Result: Y
Prior MH Diagnosis: N
Children Aged 17 Or Less: 00
Children Aged 5 Or Less: 00
Children In CPS Placement: 00
Children In Placement With No Parental Rights: 00
Form Ok Y/N: Y
Confidential Information
USER: COHEN_ET

Figure 4.17 Episode Opening Screen, Panel 4

Closing Episodes, Substance Abuse Programs

The Episode Closing screen is similar to the Episode Opening Screen. Instead of Admit Date, it has Discharge Date. Instead of Referred From, it has Referred To. It omits the fields Diagnosis, Arrests and Prior Admits, which are collected at Episode Opening only. It adds fields, such as Client Adherence to Tx Plan, that are only collected at Episode Closing.

To close an episode:

1. Choose EPISODES from the Main Menu.
2. Choose CLOSE from the Episode Maintenance Menu to display the Episode Closing screen (Figure 4.18).

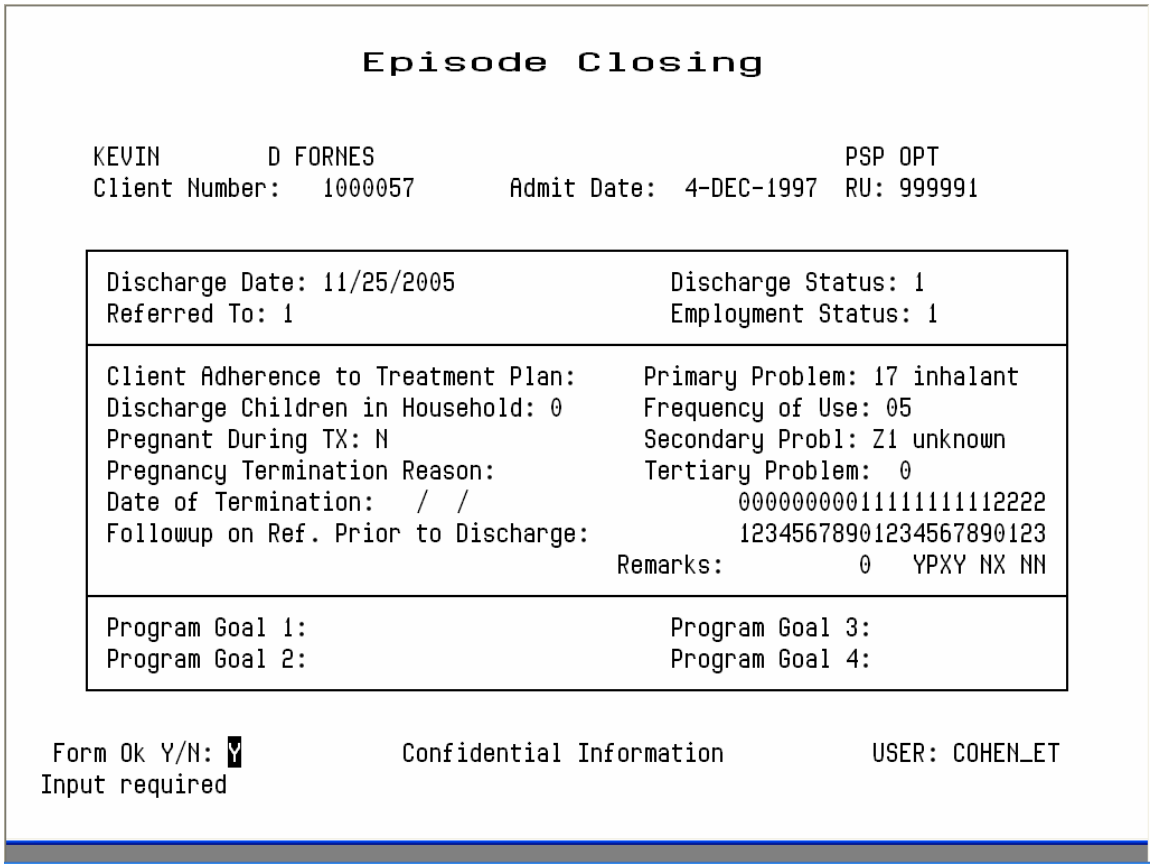

Episode Closing
KEVIN D FORNES PSP OPT
Client Number: 1000057 Admit Date: 4-DEC-1997 RU: 999991
Discharge Date: 11/25/2005 Discharge Status: 1
Referred To: 1 Employment Status: 1
Client Adherence to Treatment Plan: Primary Problem: 17 inhalant
Discharge Children in Household: 0 Frequency of Use: 05
Pregnant During TX: N Secondary Probl: Z1 unknown
Pregnancy Termination Reason: Tertiary Problem: 0
Date of Termination: / /
Followup on Ref. Prior to Discharge:
00000000011111111112222
12345678901234567890123
Remarks: 0 YPXY NX NN
Program Goal 1: Program Goal 3:
Program Goal 2: Program Goal 4:
Form Ok Y/N: Y
Confidential Information
USER: COHEN_ET
Input required

Figure 4.18: Episode Closing, Panel 1

3. Use the fields at the top of the screen to identify the Episode:

- **Client Number:** Enter a Client Number.
- **RU:** Enter the Reporting Unit number for the program.

4. The system displays an error message, if it cannot locate an open episode for that client in that program or if you are not authorized to close episodes in that program. If it finds the episode and you can close it, it displays the Admit Date. Enter data in the following fields:

- **Discharge Date:** Enter the discharge date. The current date is the default. You cannot enter a future date or a date before the opening date. Validation against table Discharge_Reason_Master
- **Referred To:** Enter a Reporting Unit number if the client was discharged to another program, or a specific

Agency Code assigned by your system, or a generic code to indicate self or other or a type of local agency. For information on referral codes, contact your system manager.

- **Discharge Status:** Enter a Discharge Status Code from back of the Episode Opening/Closing/Annual Update forms.
- **Employment Status:** Enter the two-digit code that represents the client's employment status at discharge. Validation against table Employment_status_Master.
- **Client Adherence to Tx Plan:** Enter "Y" or "N".
- **Discharge Children in Household:** Enter the number of children living with the client at discharge.
- **Client Pregnant During Treatment:** Enter "Y" or "N" to indicate whether the client became pregnant while in treatment or enter "Z1". Enter "N" for males.
- **Pregnancy Termination Reason:** If applicable, enter the code for how a pregnancy terminated during the client's treatment. The codes are: 1 = Abortion, 2 = Birth-live, 3 = Birth-dead, 4 = Miscarriage.
- **Date of Termination:** If applicable, enter the date when pregnancy terminated during treatment.
- **Primary, Secondary and Tertiary Problems (Admission Status = 1 only):** Update these fields if necessary. See the Episode Opening documentation for valid codes. Validation of Primary and Secondary problems against tables Primary_Problem_Master and Secondary_Problem_Master.
- **Drug Name - Primary, Secondary :** Enter the Primary and Secondary drug name.
- **Follow-up on Referral Prior to Discharge:** Enter "Y" or "N" to indicate whether the client followed up on a referral prior to discharge.
- **Program Goals:** This field is defined by each county. Ask your system manager for more information.

5. Enter "Y" at the Form OK prompt to save your entries. If data is invalid, the system displays error messages and returns the cursor to the field that should be corrected.
6. Episode Closing panel 2 will be displayed now (Figure 4.19). Enter the following data fields:

- **Alcohol Frequency:** Enter the number of days the client has used alcohol in the past 30 days. Allowed value is 0 – 30 or "Z2".
- **IV Use:** Enter the number of days in which the client has injected in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4".
- **Paid Days Work:** Enter the number of days the client has been paid for working in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4".
- **Number of Arrests:** Enter the number of days the client has been arrested in the past 30 days. Allowed value is 0 – 30 or "Z4".
- **Days in Jail:** Enter the number of days the client has been in jail in the past 30 days. Allowed value is 0 – 30 or "Z4".
- **Days in Prison:** Enter the number of days the client has been in prison in the past 30 days. Allowed value is 0 – 30 or "Z4".
- **Days of 12 Steps/Other:** Enter the number of days the client has participated in the following social support activities in the past 30 days.

  12 -Step Meetings
  Other Self Help Meetings
  Religious /Faith Recovery or Self-Help Meetings
  Attending Meetings of organizations other than those listed above
  Interactions with Family Member and/or Friend Support of Recovery

Allowed value is 0 – 30.

- **Days Living with Substance User:** Enter the number of days the client has lived with someone who uses alcohol or drugs in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4".
- **Conflict Days with Family:** Enter the number of days the client has had a serious conflicts with family in the past 30 days. Allowed value is 0 – 30 or "Z0", "Z4".
- **Emergency Room Visits:** Enter the number of days the client has used the emergency room for physical health problem in the past 30 days. Allowed value is 0 – 99 or "Z4".
- **Hospital Overnights:** Enter the number of days in the client has stayed overnight in a hospital for physical health problem in the past 30 days. Allowed value is 0 – 30 or "Z4".
- **Days of Physical Problem:** Enter the number of days in the client has experienced physical health problem in the past 30 days. Allowed value is 0 – 30 or "Z4".
- **Outpatient Emergency Services:** Enter the number of days in the client has received outpatient emergency services for mental health needs in the past 30 days. Allowed value is 0 – 99 or "Z4".
- **Hospital/Psychiatric Facility Visits:** Enter the number of days in the client has stayed form more than 24 hours in a hospital or psychiatric facility for mental health needs in the past 30 days. Allowed value is 0 – 30 or "Z4".
- **Prescribed Medication Taken:** Has the client taken prescribed medication for mental health needs in the past 30 days? Enter Y, N or "Z4".

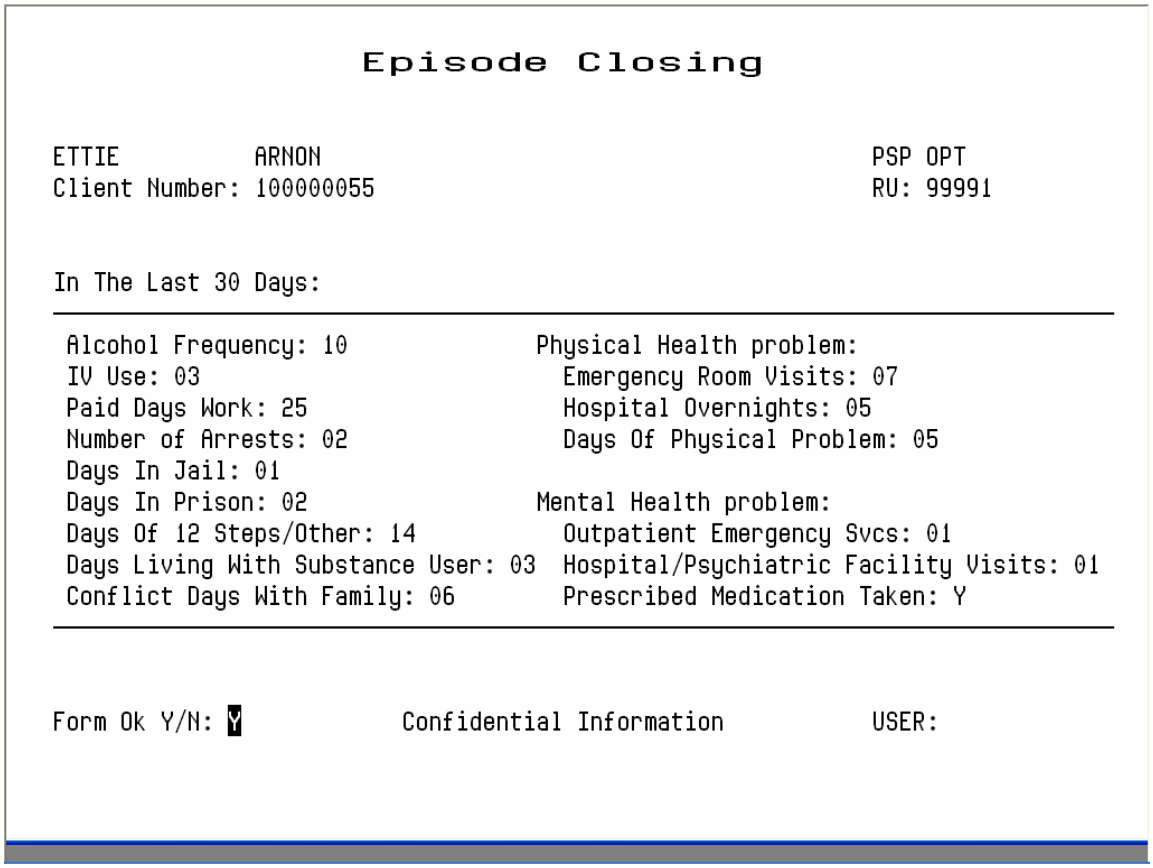


Figure 4.19 Episode closing, Panel 2

7. Enter "Y" at the Form OK prompt to save your entries. (Values "Z0" through "Z4" are converted to 99900 through 99904 before being written into the database). If data is invalid, the system displays error messages and returns the cursor to the field that should be corrected.

8. Episode Closing panel 3 will be displayed now (Figure 4.20). Enter following data fields:

- **Consent for Future Contact:** Is there a consent form allowing future possible contact signed by the client on file within your agency? Enter Y or N.
- **Enrolled in Job Training:** Is the client currently enrolled in a job training program? Enter Y, N or "Z0", "Z4".
- **Enrolled in School:** Is the client currently enrolled in school. Enter Y, N or "Z0", "Z4".
- **Hiv/Aids Tested:** Has the client been tested for HIV/AIDS? Enter Y, N or "Z0", "Z4".
- **Hiv/Aids Result:** Does the client have the result of the HIV/AIDS test? Enter Y, N or "Z0", "Z4".
- **Prior Mh Diagnosis:** Has the client ever been diagnosed with mental illness? Enter Y, N or "Z1".
- **Children Aged 17 or Less:** Enter the number of children the client has, aged 17 or less. Allowed value is 0 – 30 or "Z4".
- **Children Aged 5 or Less:** Enter the number of children the client has, aged 5 or less. Allowed value is 0 – 30 or "Z4".
- **Children in CPS Placement:** Enter the number of children the client has who are living with someone else due to child protection court order. Allowed value is 0 – 30 or "Z4".
- **Children in Placement with no Parental Rights:** Enter the number of children the client has who are living with someone else due to child protection court order AND for whom the client's parental rights have been terminated. Allowed value is 0 – 30 or "Z4".

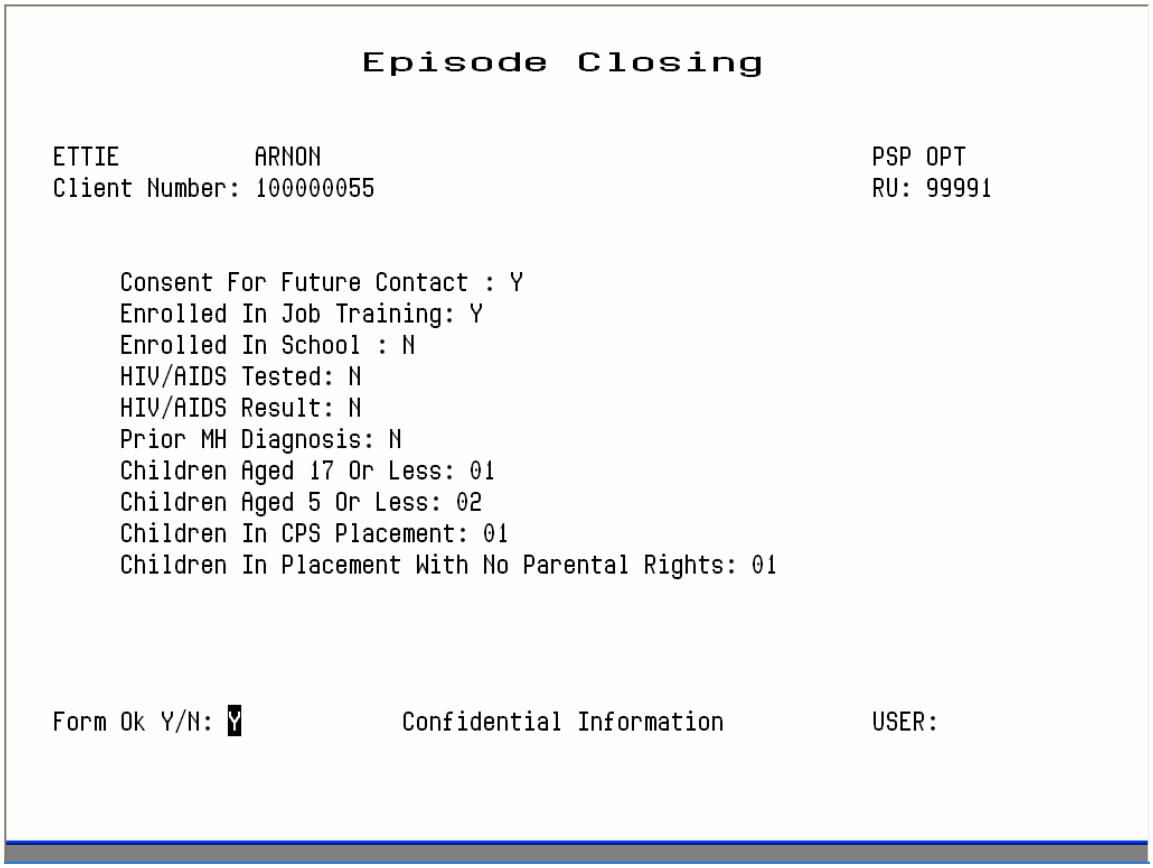


Figure 4.20: Episode Closing, Panel 3

Maintaining Episodes, Substance Abuse Programs

To maintain Episode records:

1. Choose EPISODES from the Main Menu.
2. Choose MANAGEMENT from the Episode Maintenance Menu to display the Episode Maintenance Selection screen (Figure 4.21).

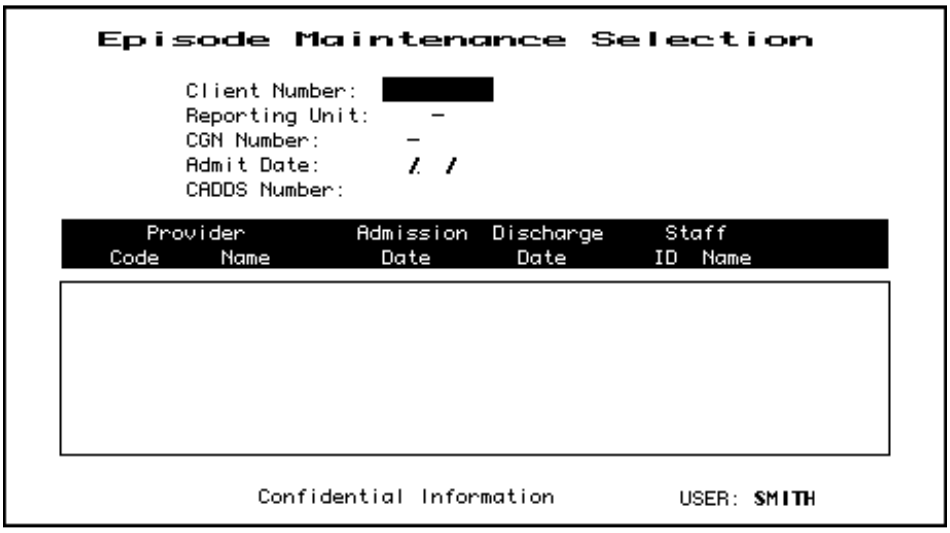


Figure 4.21: Episode Maintenance Selection Screen

3. To find Episodes, enter either a client number or CGN number (County Generated Number). To limit the search, you may also enter a reporting unit number or admit date. (Enter a full date, just a month, a month and day, or just a year; if you do not include the year, the system assumes the current year.)
4. The screen displays episodes, open or closed, that match the criteria you entered, listed in chronological order with the most recent first. If there are more records that it can display at one time, page through the list using the Num Lock Keys or Special Function Keys, described in Appendix A and B.
5. Select episodes for maintenance by using the Tab key or the Down Arrow key to move down the list and entering "L" (lookup), "U" (update), or "D" (delete) next to the episodes you want to maintain (Figure 4.22). Then press Return.

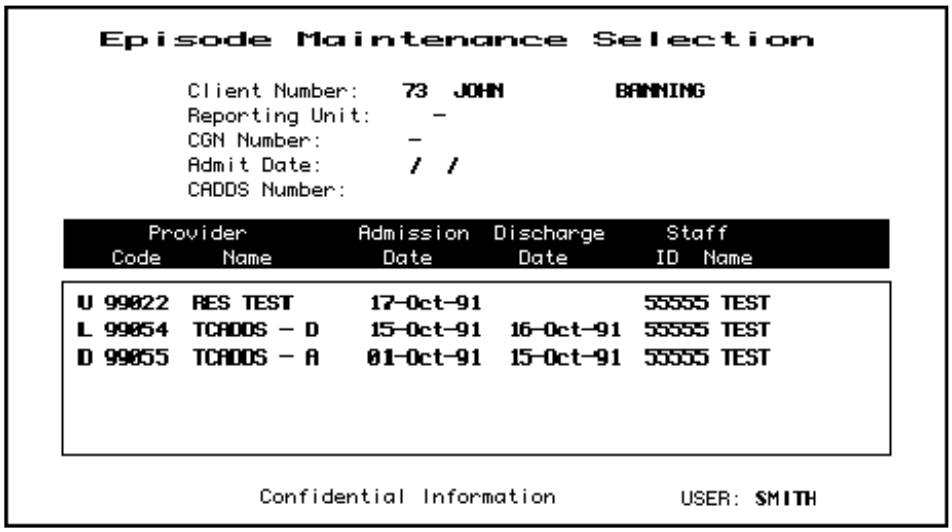


Figure 4.22: Episode Maintenance Selection Screen with Episodes Listed

Episode Lookup

If you entered "L", the system displays the Episode Look-up Screen, Panel 1 (Figure 4.23), Panel 2 (Figure 4.24) - if Admission Status is 1 – , panel 3 (Figure 4.25) and panel 4 (Figure 4.26). You can view the data for the Episode but cannot change it.

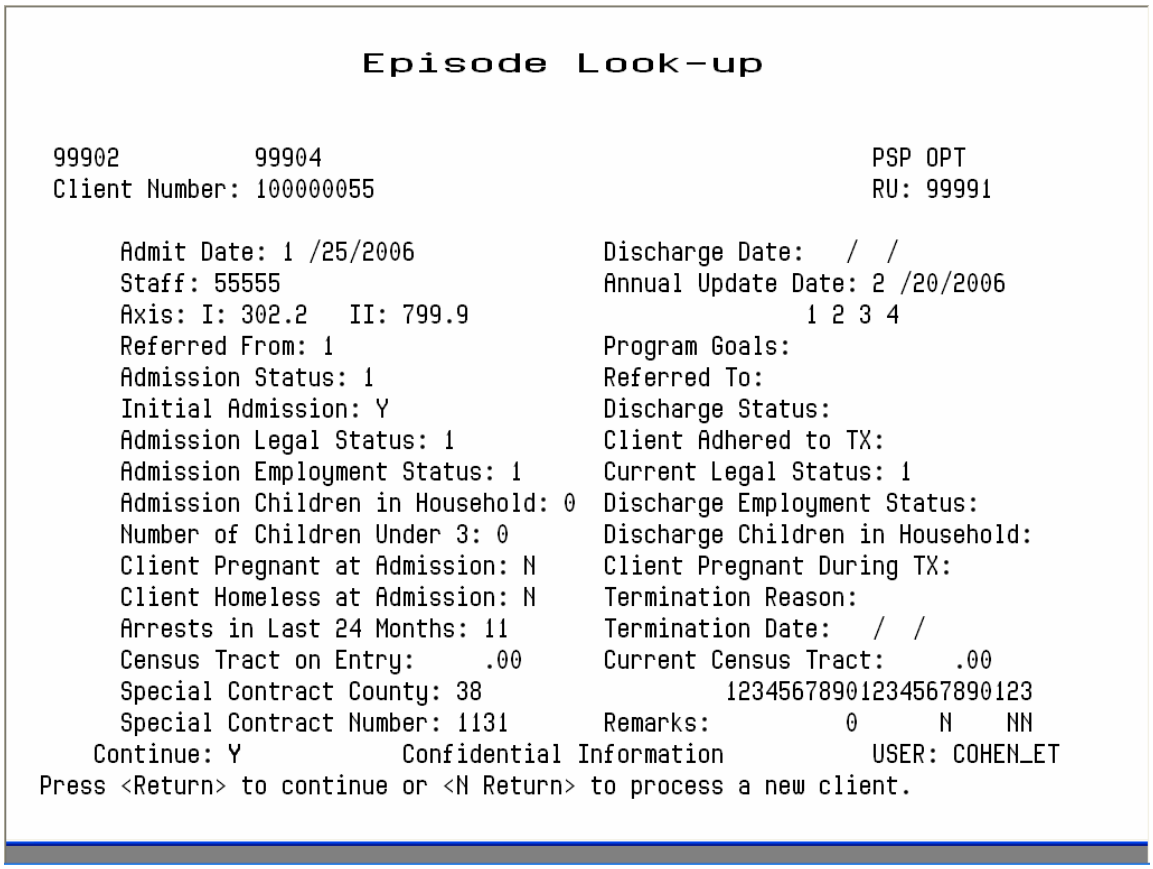

Episode Look-up
99902 99904 PSP OPT
Client Number: 100000055 RU: 99991
Admit Date: 1 /25/2006 Discharge Date: / /
Staff: 55555 Annual Update Date: 2 /20/2006
Axis: I: 302.2 II: 799.9 1 2 3 4
Referred From: 1 Program Goals:
Admission Status: 1 Referred To:
Initial Admission: Y Discharge Status:
Admission Legal Status: 1 Client Adhered to TX:
Admission Employment Status: 1 Current Legal Status: 1
Admission Children in Household: 0 Discharge Employment Status:
Number of Children Under 3: 0 Discharge Children in Household:
Client Pregnant at Admission: N Client Pregnant During TX:
Client Homeless at Admission: N Termination Reason:
Arrests in Last 24 Months: 11 Termination Date: / /
Census Tract on Entry: .00 Current Census Tract: .00
Special Contract County: 38 12345678901234567890123
Special Contract Number: 1131 Remarks: 0 N NN
Continue: Y Confidential Information USER: COHEN_ET
Press <Return> to continue or <N Return> to process a new client.

Figure 4.23: Episode Look-up Screen, Panel One

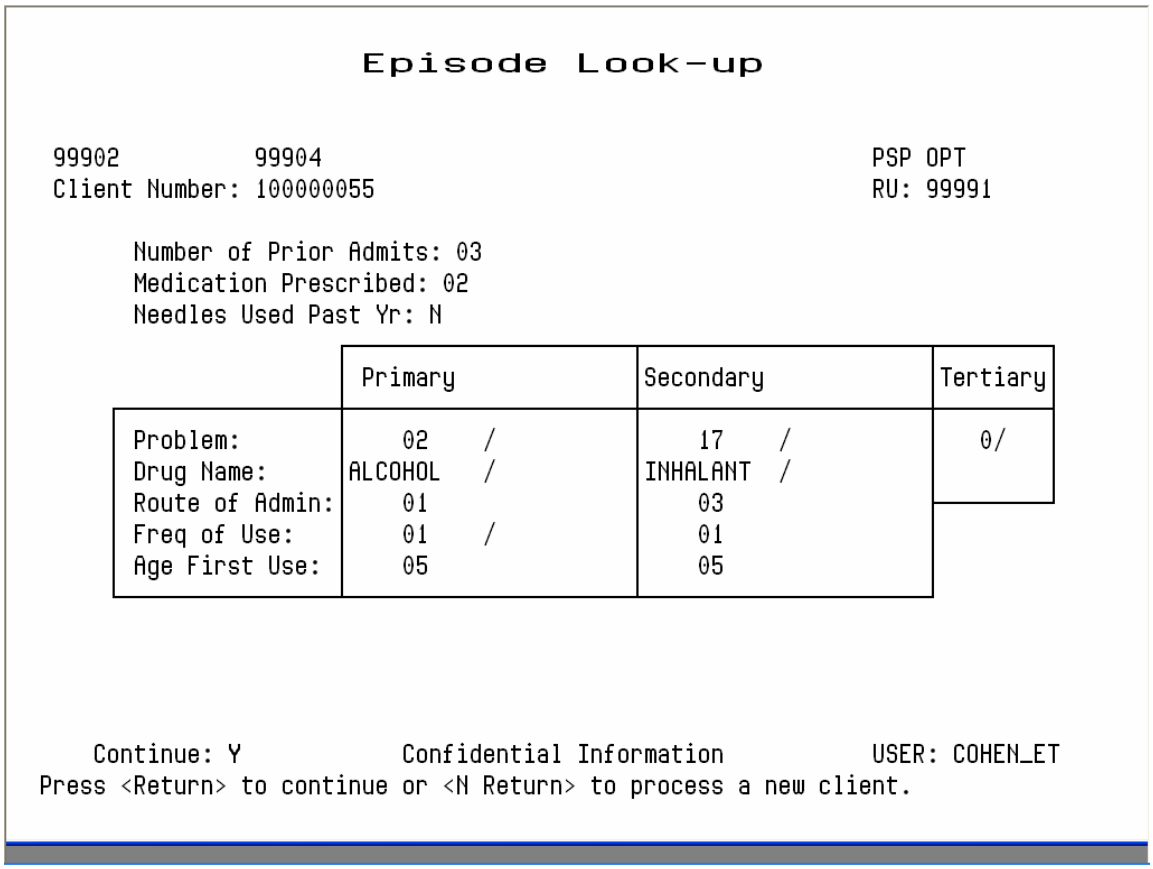

Episode Look-up
99902 99904 PSP OPT
Client Number: 100000055 RU: 99991
Number of Prior Admits: 03
Medication Prescribed: 02
Needles Used Past Yr: N
Primary
Secondary
Tertiary
Problem: 02 / 17 / 0/
Drug Name: ALCOHOL / INHALANT /
Route of Admin: 01 03
Freq of Use: 01 / 01
Age First Use: 05 05
Continue: Y Confidential Information USER: COHEN_ET
Press <Return> to continue or <N Return> to process a new client.

Figure 4.24: Episode Lookup Screen, Panel Two

Most of the data here is taken from the Episode Opening and Closing screens; for explanations see the documentation on these screens earlier in this chapter. This screen may also contain five additional fields, which are used by selected drug programs only:

- **Census:** Census tract numbers are based on client address and cannot be changed. This field is in Panel 1.
- **TAR:** A Treatment Authorization Request number (for detox Medi-Cal clients only). This field is in Panel 2.
- **Pick-up Schedule:** "Y" is displayed next to days of the week when a Methadone Maintenance client is scheduled to pick-up dose(s) at the clinic. This field is in Panel 2.
- **Detox Schedule:** This number (1 - 4) represents the prescribed methadone dosing schedule for a Methadone detox client. This field is in Panel 2.
- **Testing Schedule:** This number (1 - 4) represents urine testing schedule for a Drug client. This field is in Panel 2.

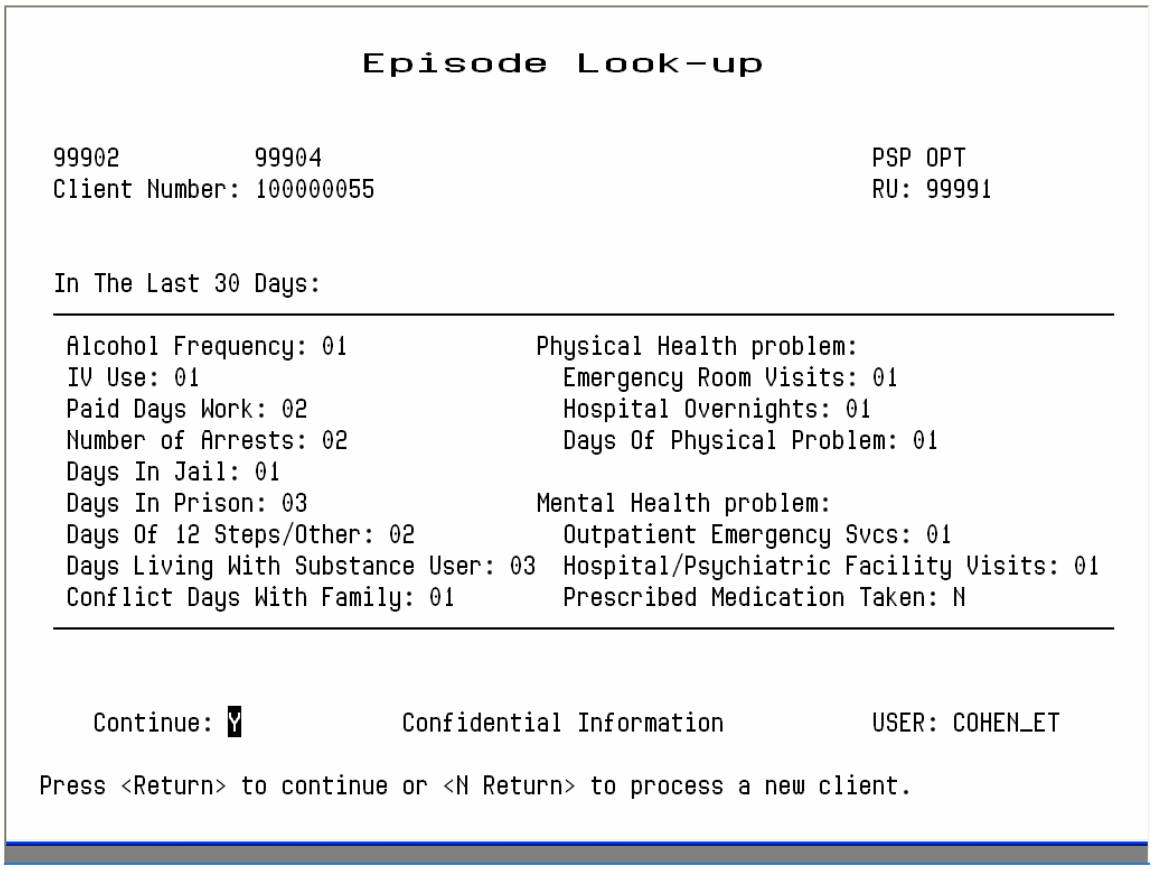

Episode Look-up
99902 99904 PSP OPT
Client Number: 100000055 RU: 99991
In The Last 30 Days:
Alcohol Frequency: 01
IV Use: 01
Paid Days Work: 02
Number of Arrests: 02
Days In Jail: 01
Days In Prison: 03
Days Of 12 Steps/Other: 02
Days Living With Substance User: 03
Conflict Days With Family: 01
Physical Health problem:
Emergency Room Visits: 01
Hospital Overnights: 01
Days Of Physical Problem: 01
Mental Health problem:
Outpatient Emergency Svcs: 01
Hospital/Psychiatric Facility Visits: 01
Prescribed Medication Taken: N
Continue: Y
Confidential Information
USER: COHEN_ET
Press <Return> to continue or <N Return> to process a new client.

Figure 4.25: Episode Lookup Screen, Panel Three

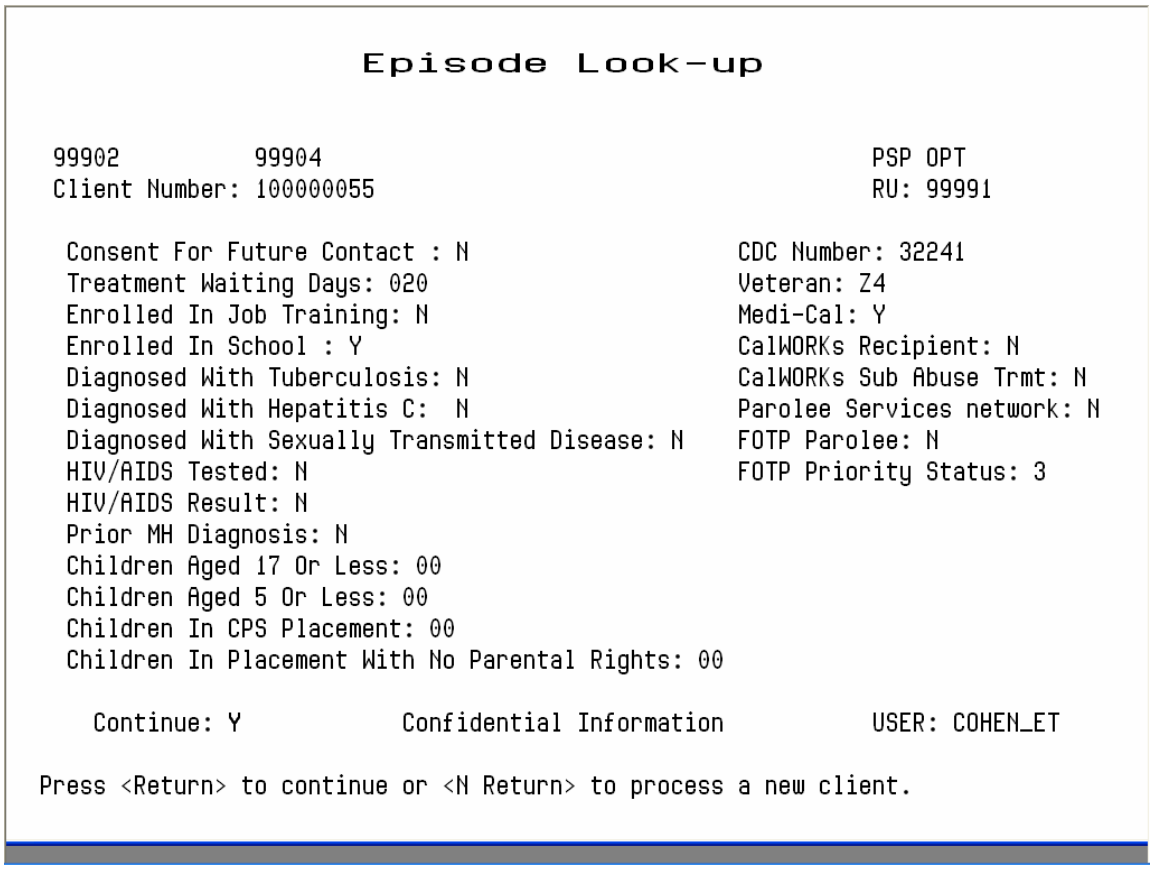

Episode Look-up
99902 99904 PSP OPT
Client Number: 100000055 RU: 99991
Consent For Future Contact : N
Treatment Waiting Days: 020
Enrolled In Job Training: N
Enrolled In School : Y
Diagnosed With Tuberculosis: N
Diagnosed With Hepatitis C: N
Diagnosed With Sexually Transmitted Disease: N
HIV/AIDS Tested: N
HIV/AIDS Result: N
Prior MH Diagnosis: N
Children Aged 17 Or Less: 00
Children Aged 5 Or Less: 00
Children In CPS Placement: 00
Children In Placement With No Parental Rights: 00
CDC Number: 32241
Veteran: Z4
Medi-Cal: Y
CalWORKs Recipient: N
CalWORKs Sub Abuse Trmt: N
Parolee Services network: N
FOTP Parolee: N
FOTP Priority Status: 3
Continue: Y Confidential Information USER: COHEN_ET
Press <Return> to continue or <N Return> to process a new client.

Figure 4.26: Episode Lookup Screen, Panel Four

Press Return to display the next record for maintenance, or enter "N" to go back to the Client Episode Maintenance Selection Screen.

Episode Delete

If you entered "D", the system displays the Episode Deletion Screen (Figure 4.27). If you are authorized, you can enter "Y" at the prompt and enter "Y" again at the confirm prompt to delete the episode. Then press Return to display the next episode selected for maintenance.

If services have been recorded for this Episode, the system displays an error message saying it may not be deleted. Refer these cases to your Supervisor.

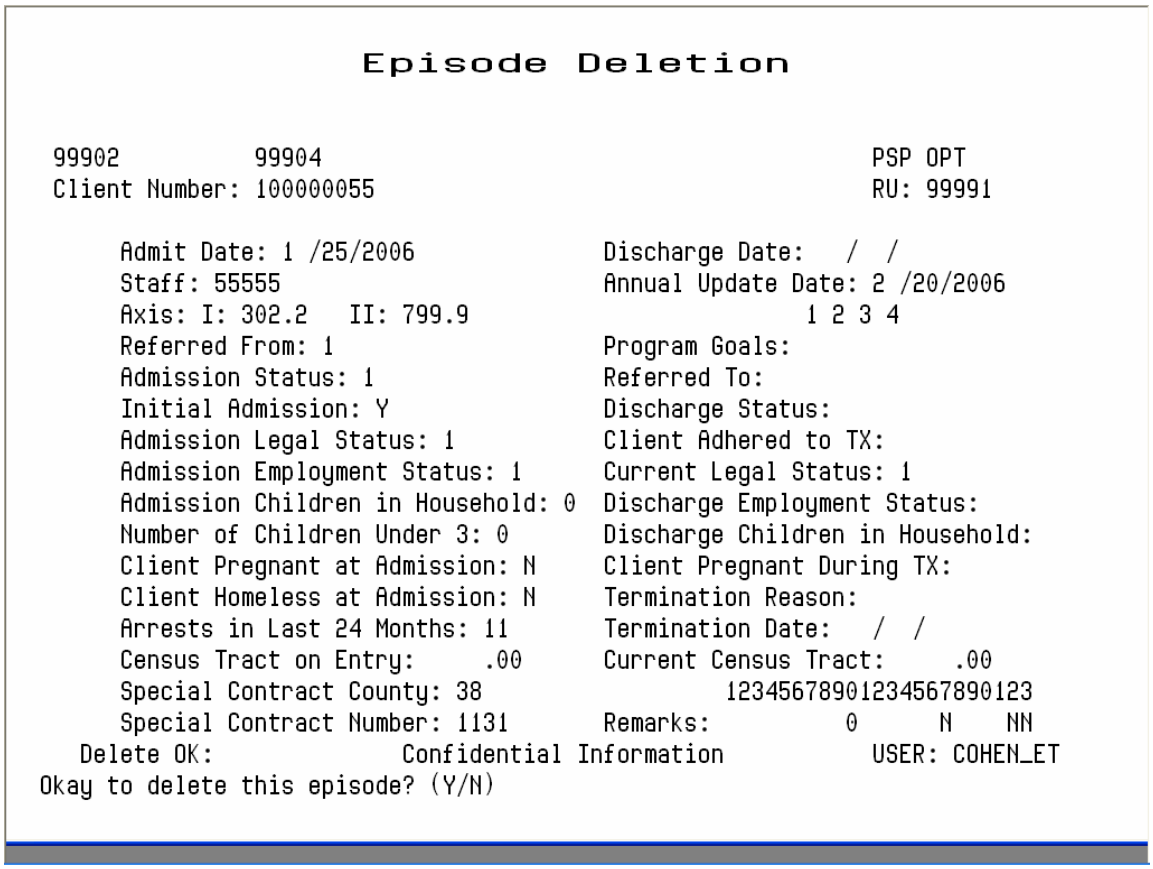

Episode Deletion
99902 99904 PSP OPT
Client Number: 100000055 RU: 99991
Admit Date: 1 /25/2006 Discharge Date: / /
Staff: 55555 Annual Update Date: 2 /20/2006
Axis: I: 302.2 II: 799.9 1 2 3 4
Referred From: 1 Program Goals:
Admission Status: 1 Referred To:
Initial Admission: Y Discharge Status:
Admission Legal Status: 1 Client Adhered to TX:
Admission Employment Status: 1 Current Legal Status: 1
Admission Children in Household: 0 Discharge Employment Status:
Number of Children Under 3: 0 Discharge Children in Household:
Client Pregnant at Admission: N Client Pregnant During TX:
Client Homeless at Admission: N Termination Reason:
Arrests in Last 24 Months: 11 Termination Date: / /
Census Tract on Entry: .00 Current Census Tract: .00
Special Contract County: 38 12345678901234567890123
Special Contract Number: 1131 Remarks: 0 N NN
Delete OK: Confidential Information USER: COHEN_ET
Okay to delete this episode? (Y/N)

Figure 4.27: Episode Deletion Screen

Episode Update

If you entered “U” and you are authorized to update Episode information for the specified program, the system displays the Episode Update Screen, Panel 1 (Figure 4.28), Panel 2 (Figure 4.29) - if Admission Status is 1 – , panel 3 (Figure 4.30) and panel 4 (Figure 4.31).

Only Supervisors can change Admit Date, Discharge Date and CADDS Form Serial Number (if entered manually).

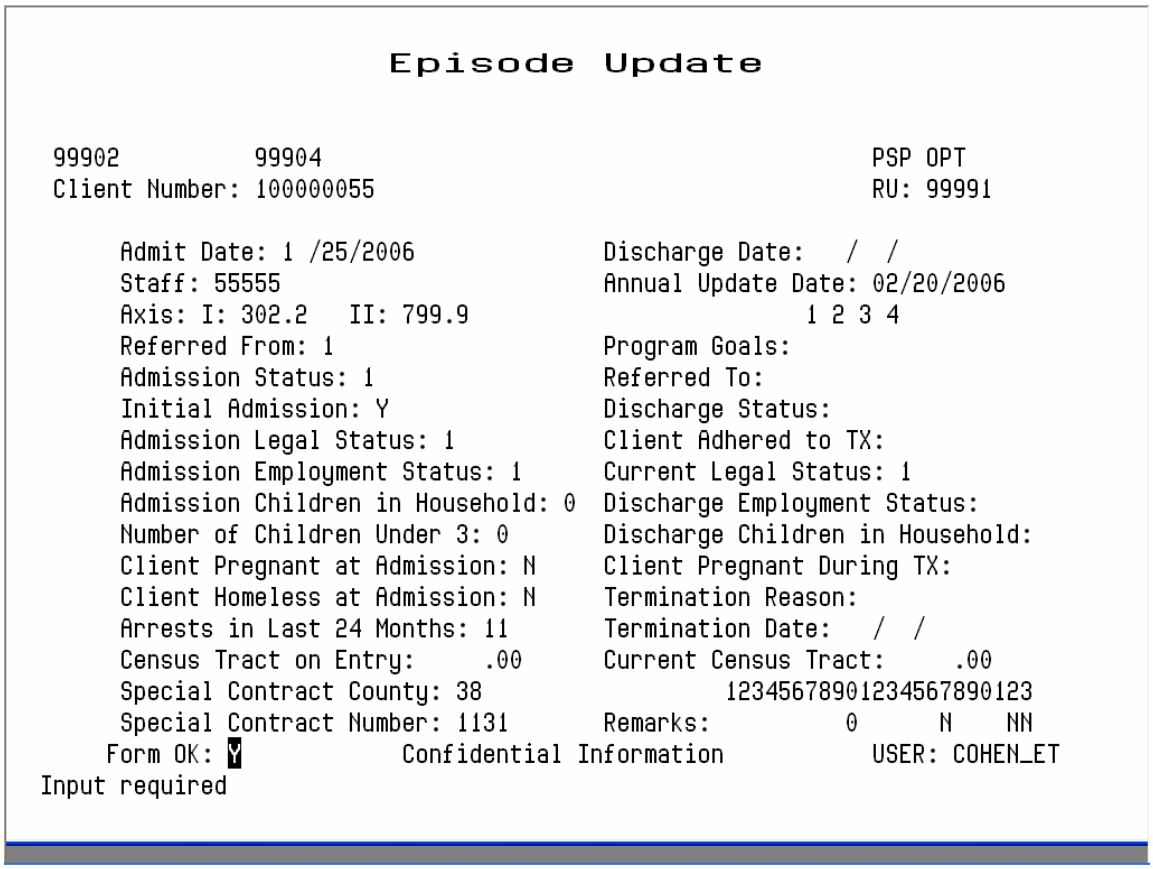

Episode Update
99902 99904 PSP OPT
Client Number: 100000055 RU: 99991
Admit Date: 1 /25/2006 Discharge Date: / /
Staff: 55555 Annual Update Date: 02/20/2006
Axis: I: 302.2 II: 799.9 1 2 3 4
Referred From: 1 Program Goals:
Admission Status: 1 Referred To:
Initial Admission: Y Discharge Status:
Admission Legal Status: 1 Client Adhered to TX:
Admission Employment Status: 1 Current Legal Status: 1
Admission Children in Household: 0 Discharge Employment Status:
Number of Children Under 3: 0 Discharge Children in Household:
Client Pregnant at Admission: N Client Pregnant During TX:
Client Homeless at Admission: N Termination Reason:
Arrests in Last 24 Months: 11 Termination Date: / /
Census Tract on Entry: .00 Current Census Tract: .00
Special Contract County: 38 12345678901234567890123
Special Contract Number: 1131 Remarks: 0 N NN
Form OK: Y Confidential Information USER: COHEN_ET
Input required

Figure 4.28: Episode Update Screen - Panel One

Most of the data here is taken from the Episode Opening and Closing screens; for explanations see the documentation on these screens earlier in this chapter. This screen may also contains five additional fields, used by selected drug programs only, Census, TAR, Pick-up Schedule, Detox Schedule and Testing Schedule. These are described in the documentation on the Episode Lookup screen, above.

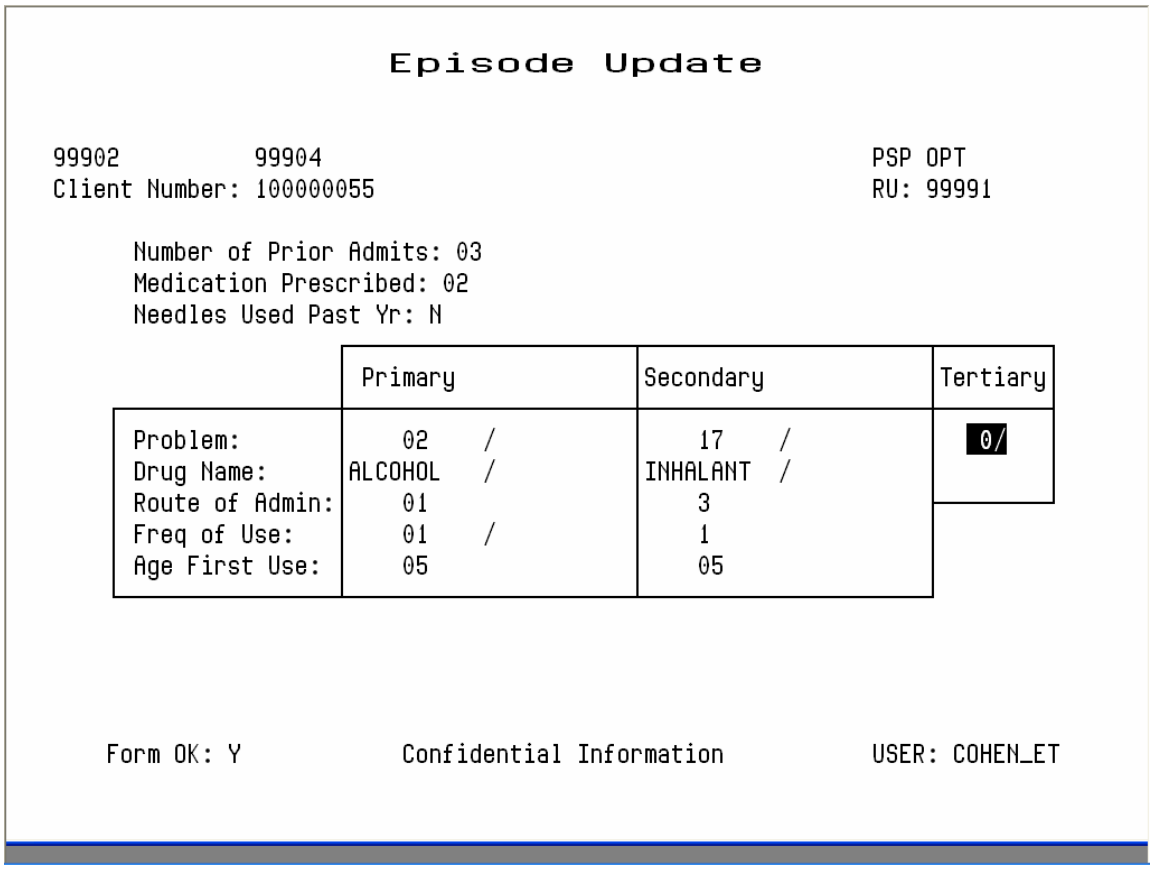


Figure 4.29: Episode Update Screen - Panel Two

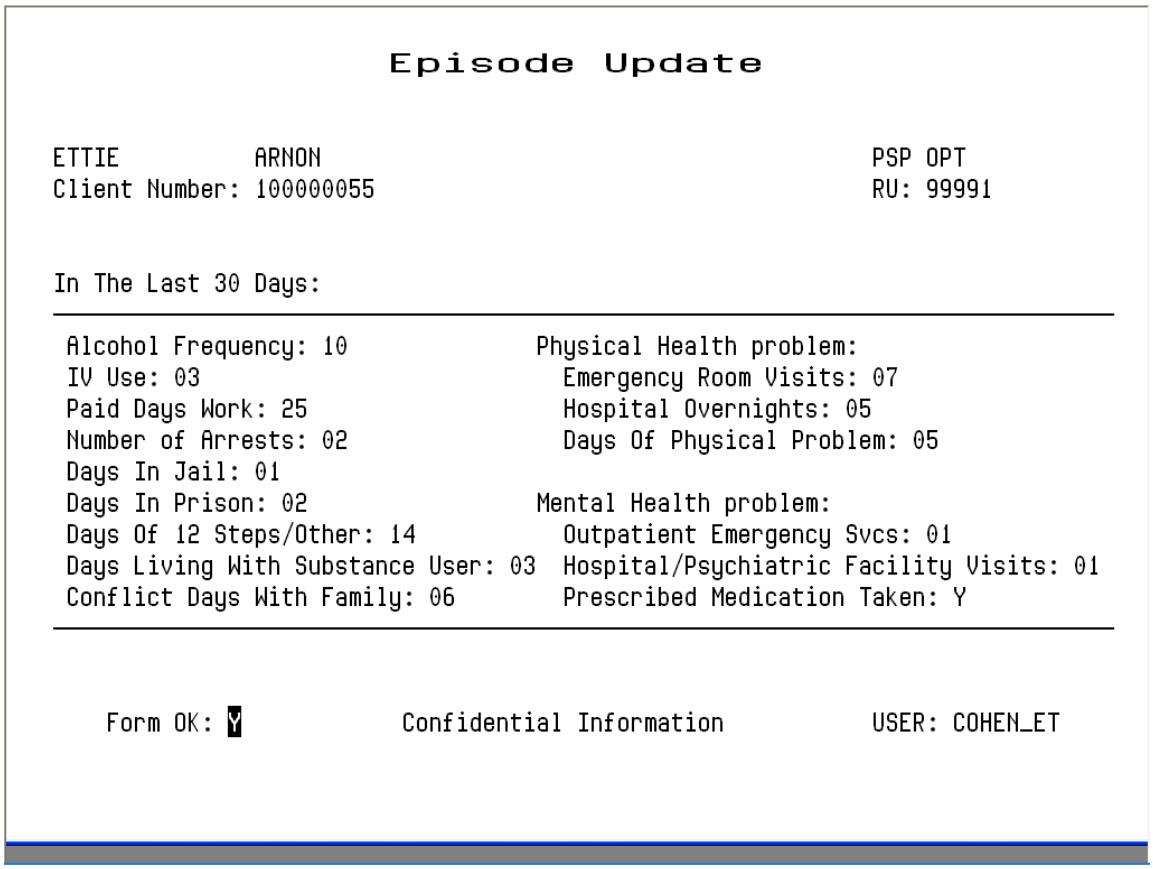


Figure 4.30: Episode Update Screen - Panel Three

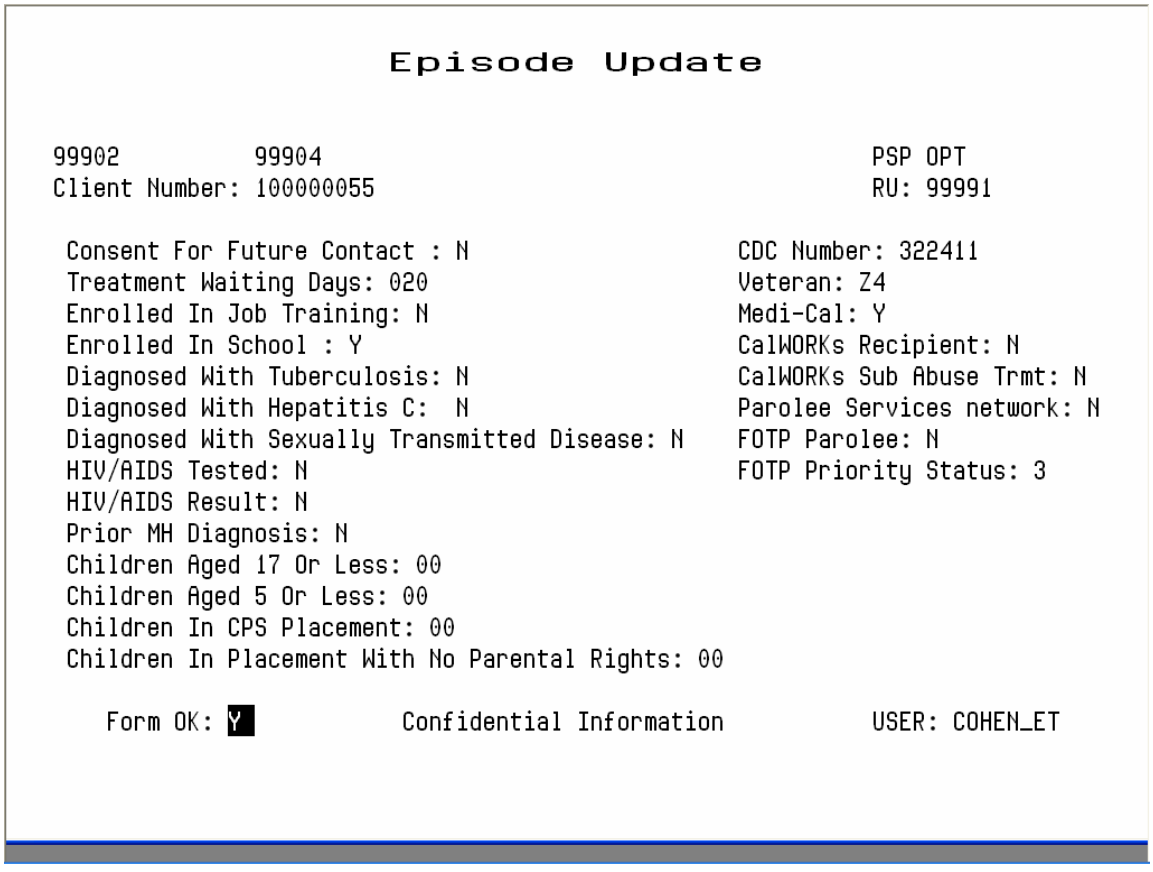


Figure 4.31: Episode Update Screen - Panel Four

CDC number, Veteran, Medi-Cal, CalWORKs Recipient and CalWORKs Sub Abuse Treatment are described in Episode Opening Panel One.

To confirm your entries, press Return to go to the Form OK prompt, and enter "Y". If you entered any invalid data, the system displays an error message and returns the cursor to the field you must correct.

Episode Update, Supervisor Authorization

Only Supervisors can change episode opening and closing dates, and CADDS Form Serial Numbers (if they have been entered manually). They can also remove Episode delete information and, in effect re-open an episode.

To display the Episode Update Screen in Supervisor mode:

1. Display the Episode Update screen as described above.
2. Press Num Lock-A. The screen title changes to Episode Update Supervisor.

If you have selected a closed episode to update, the cursor will be positioned at a special field available only to supervisors, called Re-open Episode. To remove Episode Closing information and reopen a closed episode, enter "Y" here.

Chapter 4
Direct Services

This chapter covers the different ways to record services provided by programs directly to clients. It ends with a section on substance abuse services, which use some additional data entry screens. All of these screens are on the Service Maintenance Menu.

Before services can be recorded, the client must be registered and there must be an Episode open for the client in the program providing the service on the date being recorded. See Chapter 2 for information on registering clients, and see Chapter 4 for information on opening episodes.

Entering New Direct Services

InSyst gives you based on your User Authorization and Program Site several ways of entering services:

- Single Service Entry for all programs
- Weekly Service Entry for Methadone and Residential Programs
- Multiple Service Entry to enter the same information for a number of services

Multiple Service Entry is most common and can sometimes save you time in data entry.

Single Service Entry

To do single service entry:

1. Choose SERVICES from the Main Menu.
2. Choose SINGLE from the Service Maintenance Menu to display the Single Service Entry Screen (Figure 5.1).

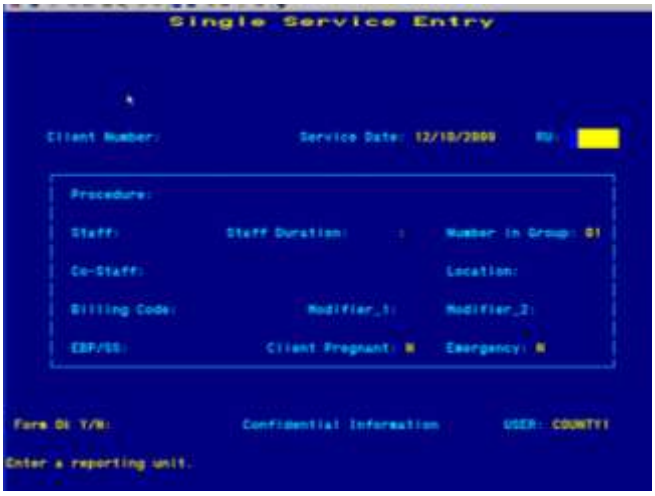


Figure 5.1: Single Service Entry Screen

3. Enter data in the following fields:

- **RU:** Enter the reporting unit number for your program and press Return. The system validates the number and displays the program's name.
- **Client Number:** Enter the Client Number. When all the data has been entered, the system will display the name of the client. At that time, review the client name to be sure you are entering services for the correct client.
- **Date:** Enter a date in the format MM/DD/YY. You cannot enter a future date. You must enter a date when the client's episode is open and the program operates.
- **Procedure:** Enter a three-digit procedure code. It must be a valid procedure for the program.
- **Staff:** Enter a staff identification number. The staff number will be validated for authorization to perform the services you are entering.
- **Co-Staff:** If there was co-staff, enter the staff identification number. You may only enter one co-staff in this system.
- **Staff Duration:** Enter the number of hours and minutes this staff person spent in this service. Enter up to twenty-three hours and up to fifty-nine minutes in the two portions of this field. There is a fixed minimum and maximum time for some services.
- **Co-Staff Duration:** If there was co-staff, enter the time they spent on the service, in the same way as Staff Duration.
- **Number in Group:** Enter a number from 1 to 99 indicating how many ***clients*** were involved in the service. The default is 01, for an individual service. If you are recording group services, enter the number of clients in the group. (For example, if Staff Person A and B have a group with 10 members that met today for 1 hour with all members present, enter 10 here. InSyst will record a service for each client number, with the staff numbers of A and B, the procedure code for a group, a group count of 10, and the time each staff person spent in the service. Each client will be billed correctly for the group service, and each staff person will be credited correctly for the time spent in the service.)
- **Location:** Enter a location code from 1 to 6: 1 = Office, 9 = Residential. The default is 1 for Office.
- **EBP/SS:** Field is not used at this time.
- **Client Pregnant:** Enter "Y" when the client meets the Client Pregnant definition on page 42.
- **Emergency:** Enter "Y" when the client meets the Emergency definition on page 42.

You <u>MUST</u> use location "9" when entering Inpatient Services on the Multiple or Single Entry screens.

4. When you are done, enter "Y" at the Form OK prompt. The system validates the data and displays the client's name. If there are incorrect values in any field, it will display an error message and return the cursor to that field.
5. Once the data is correct, the system will ask for confirmation before saving it (Figure 5.2). Enter "Y" at the Confirm prompt to save the entry.

After service entry has ended, the cursor returns to the Client Number field. You may enter a new Client Number and Date to continue entering services. If you want to enter services for another reporting unit, press Num Lock-P to move to the RU field.

Special Authorizations for the Single Service Entry Screens

Authorized personnel can use these special features of the Single Service Entry Screen.

- **Late Entry:** Press Num Lock-A once to invoke Late Entry authorization. For example, if data entry for April is closed on May 5, Late Entry authorization lets you enter services after that time.

Note: **LATE ENTRY (Num Lock-A) CANNOT BE USED WITH WEEKLY SCREENS, late services must be entered using the Single or Multiple Entry Screens ONLY.**

- **Supervisor:** Press Num Lock-A twice to invoke Supervisor authorization, which lets you override system validations in the Staff, Co-Staff, Group Count, Staff Duration, Co-Staff Duration and Location fields, but not episode boundaries. This is useful for recording unusual services.
- **Supervisor and Late Entry:** Press Num Lock-A three times to invoke both Supervisor and Late Entry authorization.

Note: When entering services in INSYST, an enhanced edit feature will identify possible duplicate services within the same Reporting Unit. The edit feature may determine a possible Medi-Cal duplicate service when claimed to DMH. Consult with providing Clinician to determine the appropriate override code.

The service entry screen will now propose an override code and display the 3 allowable override codes:

59 Distinct Procedural Service

76 Repeat Procedure by the Same Person

77 Repeat Procedure by a Different Person

Weekly Service Entry

Use this screen to enter one week of services at a time for all of the clients in your program. It is used by programs that have one primary procedure code and only one possible unit of time for the service. Residential Programs and certain types of Day Treatment programs are authorized to enter data on a weekly basis rather than a daily basis.

If an episode is open in a Residential or Day Treatment program, the client's name and number are automatically listed in the Weekly Service Entry Screen, after Report PSP 125 is run for the week.

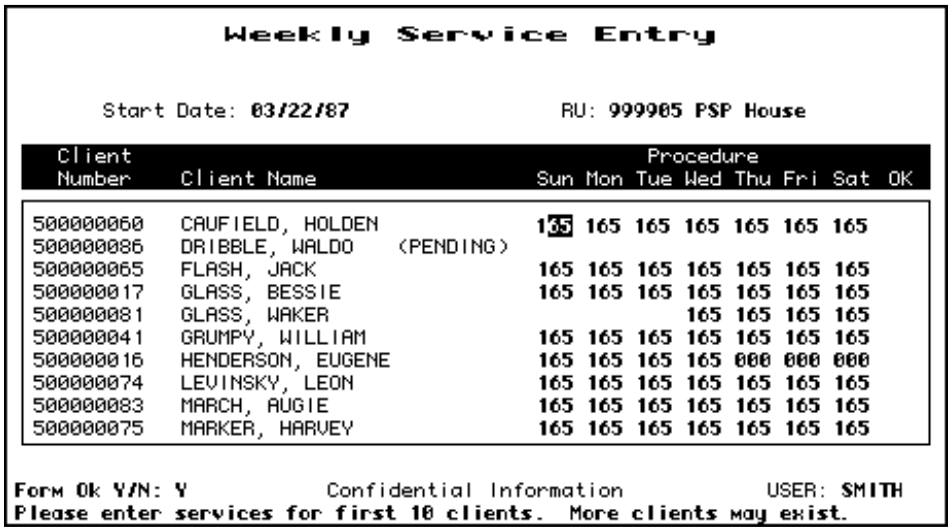
Note: Programs that use the Weekly Service Entry Screen must use the Reports menu to produce Report PSP125 ***each week*** before data can be entered. This report creates the data displayed in the Weekly Log Screen, and also produces a paper log with the same data, which can be used for data entry. For more information, see the Reports Manual.

Note: **LATE ENTRY (Num Lock-A) CANNOT BE USED WITH WEEKLY SCREENS, late services must be entered using the Single or Multiple Entry Screens.**

To do weekly service entry:

1. Choose SERVICES from the Main Menu.
2. Choose WEEKLY from the Service Maintenance Menu to display the Weekly Service Entry Screen (Figure 5.8).
3. Enter search criteria in the fields at the top of the screen:

- **Start Date:** Enter the first day of the week in the format MM/DD/YY. Your Operations Staff defines start date options in a Systems Option File. The Start Date must be a Sunday or a Monday. Data entry can be done on the last work day of the week or after the week is past.
- **RU:** Enter the Reporting Unit Number for your program.


Weekly Service Entry
Start Date: 03/22/87
RU: 999905 PSP House
Client Number
Client Name
Procedure
Sun Mon Tue Wed Thu Fri Sat OK
500000060 CAUFIELD, HOLDEN 135 165 165 165 165 165 165
500000086 DRIBBLE, WALDO (PENDING)
500000065 FLASH, JACK 165 165 165 165 165 165 165
500000017 GLASS, BESSIE 165 165 165 165 165 165 165
500000081 GLASS, WAKER 165 165 165 165
500000041 GRUMPY, WILLIAM 165 165 165 165 165 165 165
500000016 HENDERSON, EUGENE 165 165 165 165 000 000 000
500000074 LEVINSKY, LEON 165 165 165 165 165 165 165
500000083 MARCH, AUGIE 165 165 165 165 165 165 165
500000075 MARKER, HARVEY 165 165 165 165 165 165 165
Form Ok Y/N: Y
Confidential Information
USER: SMITH
Please enter services for first 10 clients. More clients may exist.

4. If a valid Start Date and Reporting Unit are entered, the Weekly Service Entry Screen lists all clients open in that program for that week in alphabetical order, ten at a time. For each record in the list, enter data in the following fields:

- **Procedure Code:** This field displays the default procedure code for the reporting unit. In most cases this is the only procedure code allowed, except for "000" to indicate that no service was given. There are a few programs that also have other Procedure Codes. You may accept one day's procedure code by pressing Tab, or accept a week's procedure codes by pressing Return to move to the end of the line. (When the services records are recorded, they use the default time for the procedure code entered.)
- **OK:** This field lets you confirm that the information for this client is correct. Enter "W" to Write the services, "S" to Skip the line, or "D" to Drop the client from this Entry Screen. (If you enter "S", all of the services for that client will be skipped. To write some services for the client but not all, enter "000" for the day the client is to be skipped, and enter "W" in the "OK" field.)

5. Enter "Y" at the Form OK prompt to save the data (Figure 5.9). The system validates the data, and if there are any errors, it returns the cursor to the field that must be corrected and displays an error message.
6. If there are more clients in the program, press Return to display the next 10 clients.

The screen lets you record services only for the days the client was open in the program. If a client is opened in the program on Wednesday, the screen will not allow you to enter services for the client for Sunday, Monday, or Tuesday.

If a client's registration status is pending, this is noted on the screen and you cannot enter services

Note:

for that client until the registration has been approved. See the Client Maintenance section in Chapter 2 of this User Manual for information on pending registrations.

- **Client Pregnant:** Enter "Y" when the client meets the Client Pregnant definition on page 42.

  Client Pregnant- The pregnancy indicator is required when the client is known to the provider to be either pregnant or postpartum. The indicator will be used for adjudicating claims and for statistical purposes, for which the client's perinatal eligibility is relevant. The "Y" code indicates that the patient is pregnant/postpartum. If the field is not used it means the client is not pregnant/postpartum.

- **Emergency:** Enter "Y" when the client meets the Emergency definition on page 42.

  Emergency- This indicator is now required by the State when the service is known to be an emergency by the provider. DMH defines emergency as: The patient requires immediate medical/mental health intervention as a result of severe, life threatening, or potentially disabling conditions. Note: There is no requirement that a service must be provided in a hospital setting to meet the definition of an emergency.

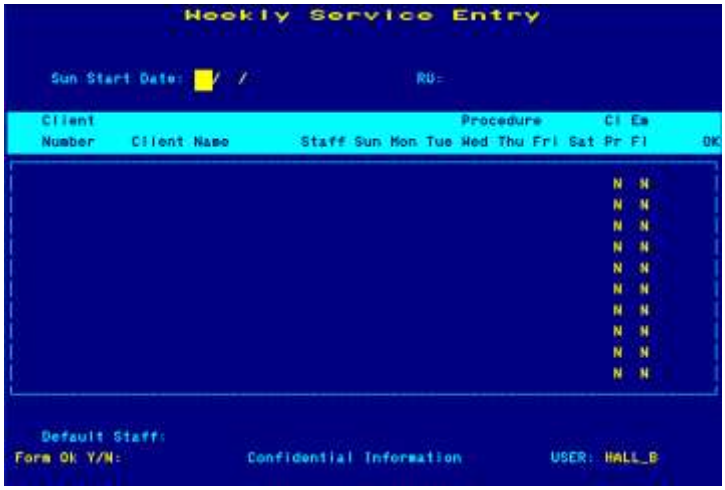


Figure 5.9: Weekly Service Entry Screen, Service Entry

If you have used "S" to skip all of the services for one or more clients, you can still use the Weekly Service Entry Screen to record those services by leaving the screen and then displaying it again to begin data entry. The clients you originally skipped are listed on the screen.

If you have skipped some services for clients, but not all, those clients will not appear again on the Weekly Service Entry screen for that week. To enter services for them, use the Single Service Entry Screen, described earlier in this chapter.

If you are unsure which services have been recorded and which have not, press Num Lock-S to leave the screen saving the current Reporting Unit Number. Choose SERVICES from the Main Menu, and then choose MANAGEMENT from the Service Maintenance Menu. When the screen prompts you, enter a Client Number and press Return, to display services for that client in the program. Then return to the Weekly Service Entry Screen to continue service entry.

Note: It is best to use this screen is to enter services weekly. ***You must enter services chronologically.*** For example, if you need to enter services for the week of Sunday, March 1 through Saturday, March 7th, Wednesday, March 2, and Thursday, March 3, then you must enter services for Tuesday first, then for Wednesday, then for Thursday. If you accidentally enter services for March 3, you cannot use this screen for March 1 and 2; you must use the Single Service Entry Screen.

Multiple Service Entry

The Multiple Service Entry Screen makes it easy to enter repetitive data—for example, to enter a number of services for one client or one staff person, or to enter all of one type of service for a day. It lets you create user-defined defaults that enter the repetitive data automatically.

To do multiple service entry:

1. Choose SERVICES from the Main Menu.
2. Choose MULTIPLE from the Service Maintenance Menu to display the Multiple Service Entry screen (Figure 5.10). This screen resembles the Single Service Entry screen.

3. To identify the program you are doing data entry for, enter:

- **Reporting Unit:** Enter the Reporting Unit Number for the program, and the screen displays its name. (To enter services for a different program during the same session, press Num Lock-P to move the cursor back the RU field, or press Num Lock-R to restart the screen.)

4. The cursor moves to the Defaults box (Figure 5.11). Data you enter here will be repeated for every service you enter in the list below, until you enter new defaults. You can enter default data for one or more of the following fields:

- **Client Number:** Enter a client number.
- **Service Date:** Enter a date in the format MM/DD/YY.
- **Procedure:** Enter a three-digit procedure code. The field accepts only direct service procedure codes that are valid for your program.
- **Staff:** Enter a staff identification number. It will be validated for authorization to perform the services you enter.
- **Duration:** Enter the number of hours (up to 23) and minutes (up to 59) the staff person spent in this service. Counties set fixed time ranges for some services.
- **Co-Staff:** Enter the Co-staff identification number, if there is one. It will also be validated for authorization to perform the services you enter. (Your screen may not include this

column.)

- **Number in Group:** Enter a number from 1 to 99 indicating how many ***clients*** were involved in the service. The default is "01" for an individual session.
- **Location:** Enter the location code, from the following options: 1 = Office, 9= Residential. Use the location where the most basic component of the service occurred. The default is "1" for office.

5. After you have entered defaults, enter "Y" at the Form OK prompt (Figure 5.12). The system validates data and prompts you to correct any errors.

Note: LATE ENTRY (Num Lock-A) CANNOT BE USED WITH THE WEEKLY SCREENS, late services must be entered using the Single or Multiple Entry Screens ONLY.

You MUST use location "9" entering Residential Services on the Multiple or Single Entry screens.

6. Now, you can use the defaults to enter up to 20 services using the default information. The information you entered in the default box is displayed automatically as you enter data in the screen's service entry lines (Figure 5.13). You can modify the default data, if necessary, or just press Tab to accept the default value and move to the next field. At the end of each line you want to save, you must enter "W" to write the service.
7. When you are done entering service data, press Return to move to the Form OK prompt and enter "Y" to accept the data. After the system validates the data, enter "Y" at the Confirm prompt to save the data.

The screen is cleared and the cursor moves back to the defaults line, so you can enter additional services or change the defaults.

You can imagine how useful this screen would be, for example, if you had to enter the same service for a client for a large number of service dates. You could just change the date and accept the defaults for all the other fields.

Maintaining Direct Services

To maintain direct services:

1. Choose SERVICES from the Main Menu.
2. Choose MANAGEMENT from the Service Maintenance Menu to display the Service Maintenance Selection Screen (Figure 5.15).
3. To display a list of services, enter:

- **Client Number:** You must enter the number of the client who received the services.
- **Reporting Unit:** To narrow the search, you may also enter a Reporting Unit number.
- **Service Date:** To narrow the search, you may also enter a complete date or a partial date that is just a month or year. If you leave out the year, the system uses the current year.

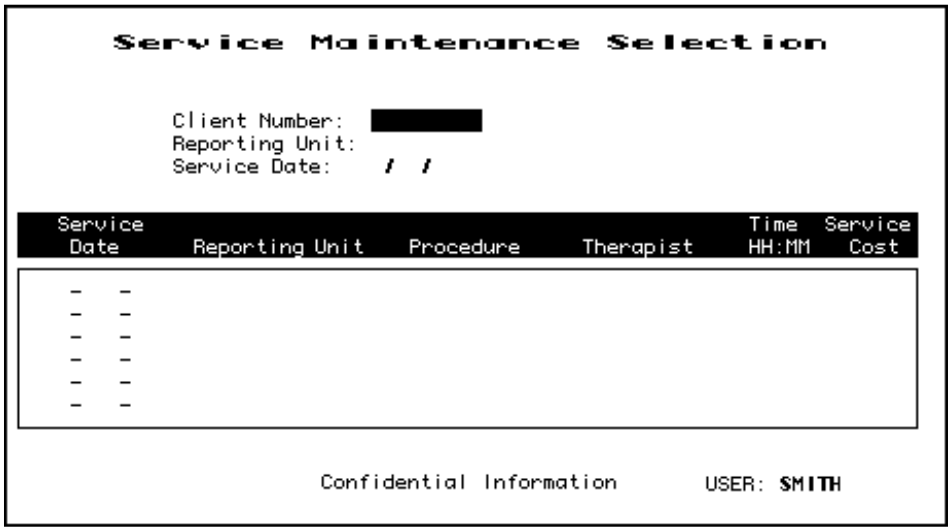


Figure 5.15: Service Maintenance Selection Screen

4. The Screen displays the Client Name and all the services for the client that match the criteria entered, listed with the most recent services first (Figure 5.16). Move through the list using the methods described in the section on Moving Through Lists in Chapter 1. Enter "L" (lookup), "D" (delete), or "U" (update) next to the services you want to maintain (Figure 5.17).

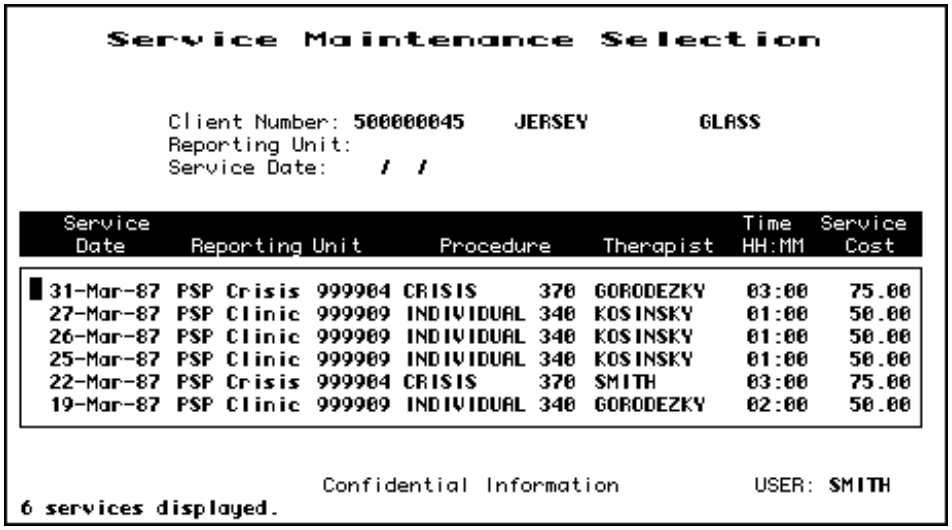

Service Maintenance Selection
Client Number: 500000045 JERSEY GLASS
Reporting Unit:
Service Date: / /
Service Date
Reporting Unit
Procedure
Therapist
Time HH:MM
Service Cost
31-Mar-87 PSP Crisis 999004 CRISIS 370 GORODEZKY 03:00 75.00
27-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 KOSINSKY 01:00 50.00
26-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 KOSINSKY 01:00 50.00
25-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 KOSINSKY 01:00 50.00
22-Mar-87 PSP Crisis 999004 CRISIS 370 SMITH 03:00 75.00
19-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 GORODEZKY 02:00 50.00
Confidential Information
USER: SMITH
6 services displayed.

Figure 5.16: Service Maintenance Selection Screen with Services Listed

5. You may select up to 24 services. When you are done, press Return to display them for maintenance.

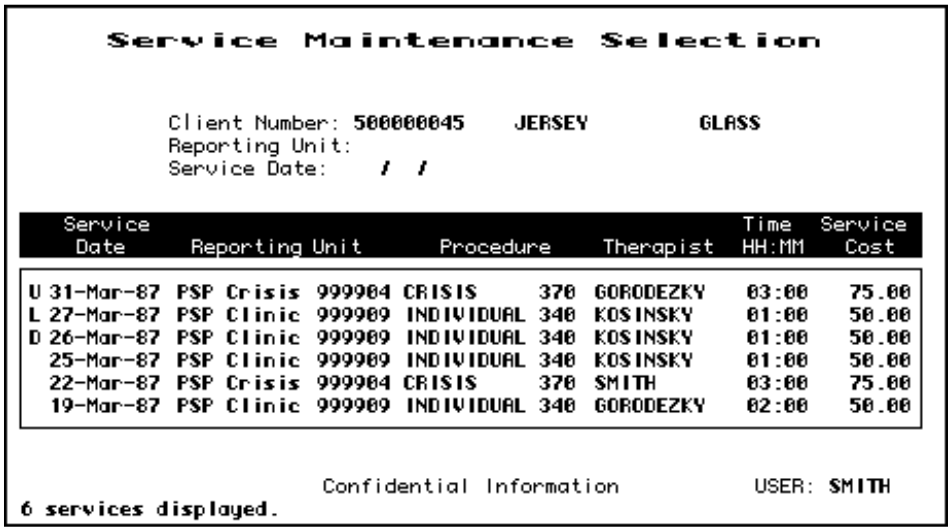

Service Maintenance Selection
Client Number: 500000045 JERSEY GLASS
Reporting Unit:
Service Date: / /
Service Date | Reporting Unit | Procedure | Therapist | Time HH:MM | Service Cost
U 31-Mar-87 PSP Crisis 999004 CRISIS 370 GORODEZKY 03:00 75.00
L 27-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 KOSINSKY 01:00 50.00
D 26-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 KOSINSKY 01:00 50.00
25-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 KOSINSKY 01:00 50.00
22-Mar-87 PSP Crisis 999004 CRISIS 370 SMITH 03:00 75.00
19-Mar-87 PSP Clinic 999009 INDIVIDUAL 340 GORODEZKY 02:00 50.00
Confidential Information
USER: SMITH
6 services displayed.

Figure 5.17: Service Maintenance Selection Screen, Selecting Services for Maintenance

Direct Service Lookup

If you entered “L” next to a service, it is displayed in the Service Look-up screen (Figure 5.18). The data cannot be changed.

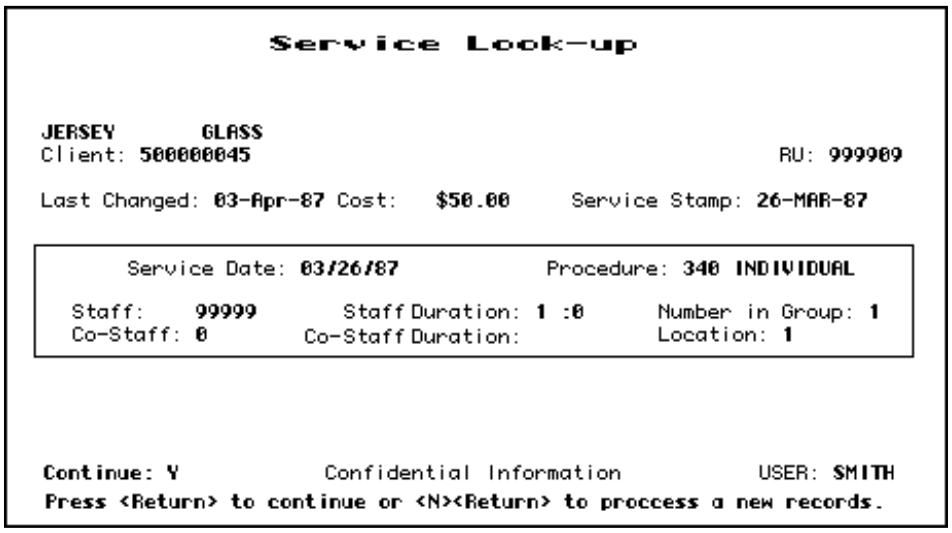

Service Look-up
JERSEY GLASS
Client: 500000045
RU: 999909
Last Changed: 03-Apr-87 Cost: $50.00 Service Stamp: 26-MAR-87
Service Date: 03/26/87 Procedure: 340 INDIVIDUAL
Staff: 99999 Staff Duration: 1 :0 Number in Group: 1
Co-Staff: 0 Co-Staff Duration: Location: 1
Continue: Y Confidential Information USER: SMITH
Press <Return> to continue or <N><Return> to proccess a new records.

Figure 5.18: Service Look-up Screen

In addition to the data in the Service Maintenance selection screen, this screen displays:

- **Last Changed:** The date that the displayed record was last modified by a user or system program.
- **Cost:** The amount charged for the displayed service.
- **Service Stamp:** The date that the service was originally entered into the system.

Press Return to display the next record selected in the Service Maintenance Selection Screen. Type “N” and press Return to go back to the Service Maintenance Selection Screen.

Direct Service Delete

If you entered "D" next to a service, it is displayed in the Service Delete Screen (Figure 5.19). If you are authorized, you can enter "Y" at the Delete OK prompt and "Y" again at the confirm prompt to delete the service.

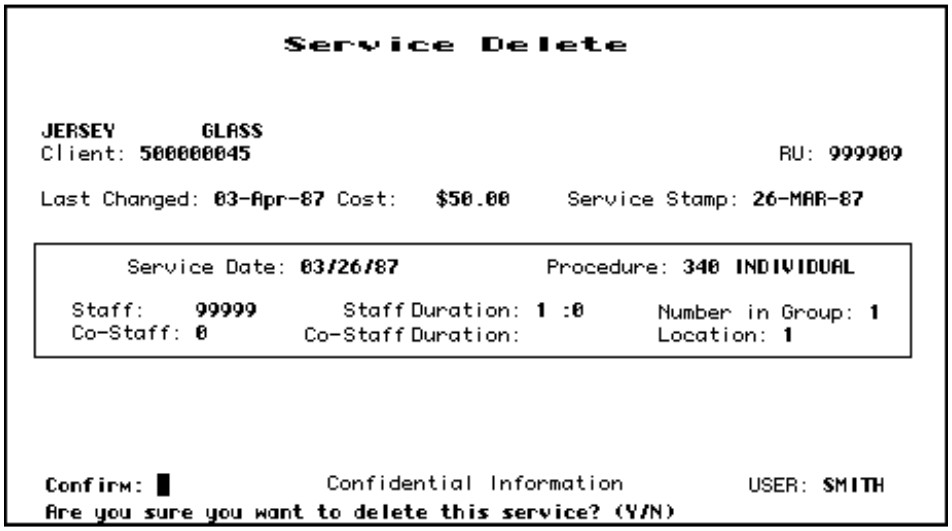

Service Delete
JERSEY GLASS
Client: 500000045
RU: 999909
Last Changed: 03-Apr-87 Cost: $50.00 Service Stamp: 26-MAR-87
Service Date: 03/26/87 Procedure: 340 INDIVIDUAL
Staff: 99999 Staff Duration: 1 :0 Number in Group: 1
Co-Staff: 0 Co-Staff Duration: Location: 1
Confirm:
Confidential Information
USER: SMITH
Are you sure you want to delete this service? (Y/N)

Figure 5.19: Service Delete Screen

If a service has been posted in the billing system, the service may not be deleted unless you have the correct authorization. If this occurs, tell your supervisor.

Late Entry, and Supervisor Authorization

Late Entry and Supervisor Authorization are available in all three of the Maintenance Screens.

In the Update screen (Figure 5.21), Supervisor Authorization lets you change Service Date and Procedure.

In the Lookup and Update Screens, Supervisor Authorization lets you view these additional fields:

- **Posting Status:** The service status within the billing system.

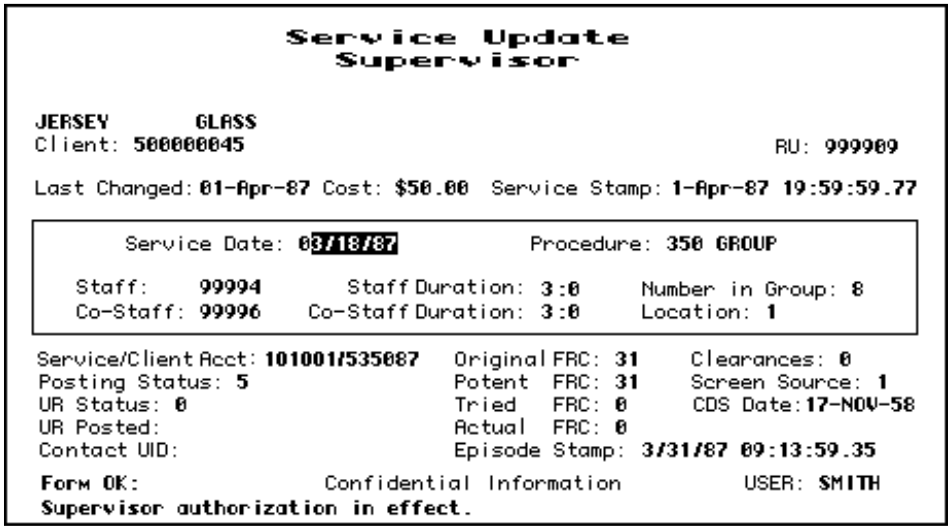


Figure 5.21: Service Update Screen, Supervisor Mode

- **Original FRC:** All payor sources (Medicaid, Medicare, County, Insurance, Patient) that can be billed for this type of service in your system.
- **Potential FRC:** All payor sources (Medicaid, Medicare, County, Insurance, Patient) that can be billed for this particular service.
- **Tried FRC:** Payor sources (Medicaid, Medicare, County, Insurance, Patient) that you have tried to bill for the service.
- **Actual FRC:** Payor sources (Medicaid, Medicare, Short-Doyle, Insurance, Patient) that have actually been billed for the service.
- **Episode Stamp:** The Episode to which the Service is attached. Episodes can be positively identified by their Key Entry Date which is referred to here as Episode Stamp.
- **Clearances:** The Clearances Flagword in the database. This code will identify which systems have processed this service (POSTING, BILLING, CDS, UR, POE).
- **Screen Source:** The screen used to enter the service.

In the Delete Screen, the Supervisor Authorization lets you delete a service that has been posted by the billing system. In this case, the Delete Screen deletes the service and also writes an adjustment to the client's account. Supervisor Authorization alone does not allow you to delete a service that has been claimed to a payor source: you must also have additional authorization.

To use late entry and Supervisor authorization:

1. Display the Service Lookup, Delete or Update screen.
2. Press Num Lock-A to display the screen in Late Entry mode, to enter data for a time period whose deadline has passed.
3. Press Num Lock-A a second time to display the screen in Supervisor mode.
4. Press Num Lock-A a third time to display the screen in both Supervisor and Late Entry mode.

Chapter 5
Utilities

Use the Utilities Menu to send and receive e-mail, manipulate files, manage the printer queue, and maintain your logon password.

INSYST is no longer used as it has been replaced with Internet E-Mail.

Passwords

Warning! If you log on to the system after your Password has expired you will be prompted for a new Password. If you bypass these prompts, you will not be able to log on again and will need call the Support Services at (510)567-8181

When you log on to the computer system, you must enter your Username and your Password. Passwords are vital to system security. Passwords expire every six (6) weeks. Two or three days earlier, you will receiving warnings that your Password is about to expire.

To change your Password:

1. Choose UTILITIES from the Main Menu.
2. Choose PASSWORD from the Utilities Menu to display the Password Menu. This has only two options: Primary Password and Secondary Password.

You may have only one password, the Primary Password. If you choose, you can also create a Secondary Password.

Printer and Queue Management

The Department assigns a name to the printer attached to your terminal, such as PQ_CHILDRENS, or SONOMA. The ***queue*** refers to the waiting line for the printer. If there are no items to be printed, the queue is empty. When you print an item, it is sent to your printer queue.

The Printer and Queue Management menu lets you manage print jobs.

Show Queue

To view the printer queue:

1. Choose UTILITIES from the Main Menu.
2. Choose PRINTER from the Utility Menu.
3. Choose SHOW from the Printer and Queue Management Menu to display the Show Queue Screen.
4. Use the field at the top to identify the queue:

- **Queue Name:** Enter the name of a print queue, or press Return to select your print queue. The screen lists all the jobs waiting in your queue to be printed, in the order that they will be printed. (Figure 15.9).

5. After viewing the Queue, press Return to go back to the Printer and Queue Management Menu.

The statuses of jobs in the queue are:

- **Pending:** a job waiting to be printed.
- **Holding:** a job put on hold, or delayed. In some cases, a time can be associated with this status, *e.g.* "holding until 15-Jun-1987 02:00".
- **Printing:** a job now printing.
- **Paused:** a job delayed in the midst of printing.
- **Aborted:** a job deleted in the midst of printing.

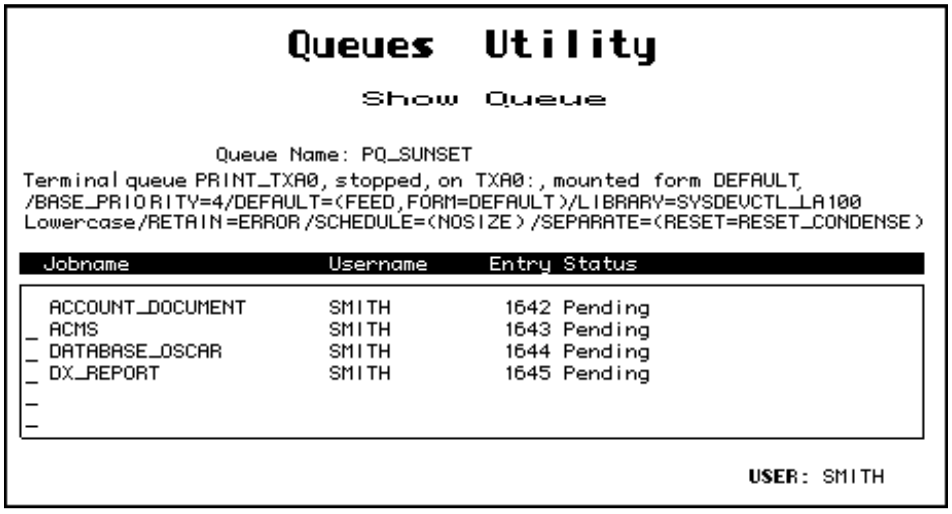


Figure 15.9: Show Queue Screen

Start Printer Queue

Use Start Printer Queue to print everything that waiting to be printed is printed, in the order that it is listed. If there is nothing to be printed, the printer readies itself.

To start the printer queue:

1. Choose UTILITIES from the Main Menu.
2. Choose PRINTER from the Utility Menu.
3. Choose START from the Printer and Queue Management Menu to display the Start Printer Queue screen (Figure 15.10). It has the following fields:

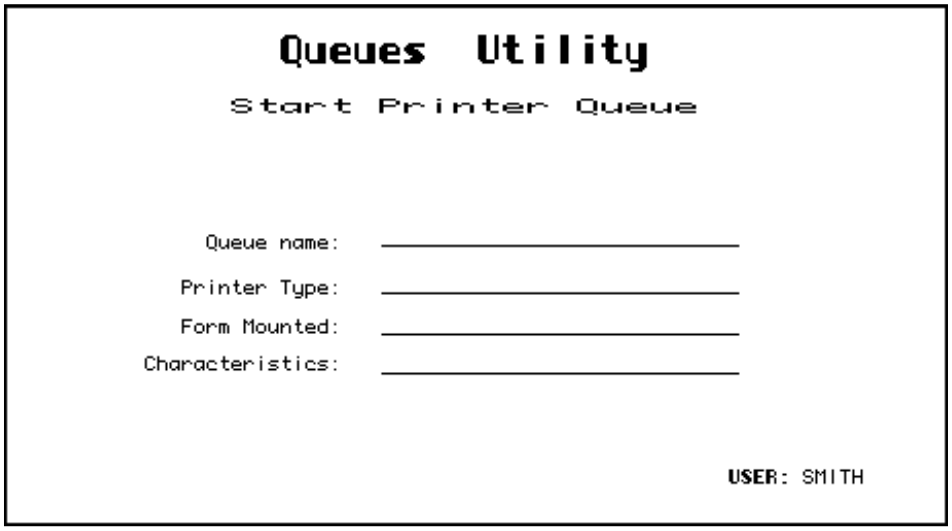
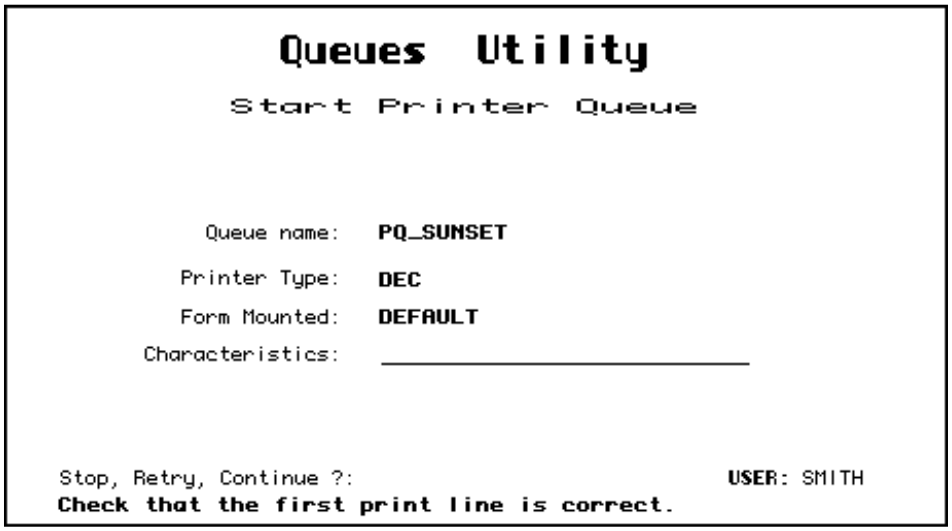


Figure 15.10: Start Printer Queue Screen

- **Queue Name:** To start your printer, enter its name here, or just press Return to accept the default printer.
- **Form Mounted:** This is not currently implemented. The only forms in use are standard 8 1/2 by 11 sheets of paper.
- **Characteristics:** This is not currently implemented. Your printer will print as designated by the document.

4. After you have indicated which printer you are using, the system displays the message shown in Figure 15.11. Make sure the paper is properly aligned. Then type “C” to Continue, “S” to Stop printing, or “R” to retry the page.



The system continues printing all jobs on the queue.

To stop the printer:

1. Press the Spacebar key. Do not press Spacebar more than once. Do not turn off your printer. If several people are using the computer system, it can take a couple of minutes to stop printing.
2. After you have stopped the printer, the system displays a message asking what it should do with the current print job. You must choose one of the options within 30 seconds, or the system will continue printing the current job. You have the following options:

- **Delay:** Moves the current job to the end of the queue. The next job begins printing. When the delayed job starts printing again, it begins on the page it was printing when the Delay command was given.
- **Delete:** Deletes the current job without it being completed. The job is removed from the printer queue. The next job begins printing.
- **Restart:** Restarts the current job at the beginning.
- **Stop:** Stops the printer. When you start the printer again, the job continues printing.
- **Wait:** Stops the printer temporarily.
- **Continue:** Continues printing the current job to continue printing where it left off.

Restarting Stopped Print Jobs

If you use the Stop Command while printing a file, the printer is stopped and you are returned to the menu.

To continue printing that job:

1. Choose START from the Printer and Queue Management Menu.
2. Use the Start Printer Queue screen to start the printer, as described above.
3. The system displays the prompt: Stop before next entry. Press Return to accept the default "N" to print all jobs on the queue, or enter "Y" to print only this job and stop again.
4. The system displays the prompt: Continue printing this entry. Press Return to continue the job.

Chapter 6
Reports

Reports available are based on your User Authorizations and Program Site. The main two types of Reports available are Caseload and Service.

To run a report:

1. Choose REPORTS from the Main Menu.
2. Choose one of the submenu options of the Report Menu (Figure 17.1). As you can see, this menu lets you choose submenus with reports that are used for different purposes.

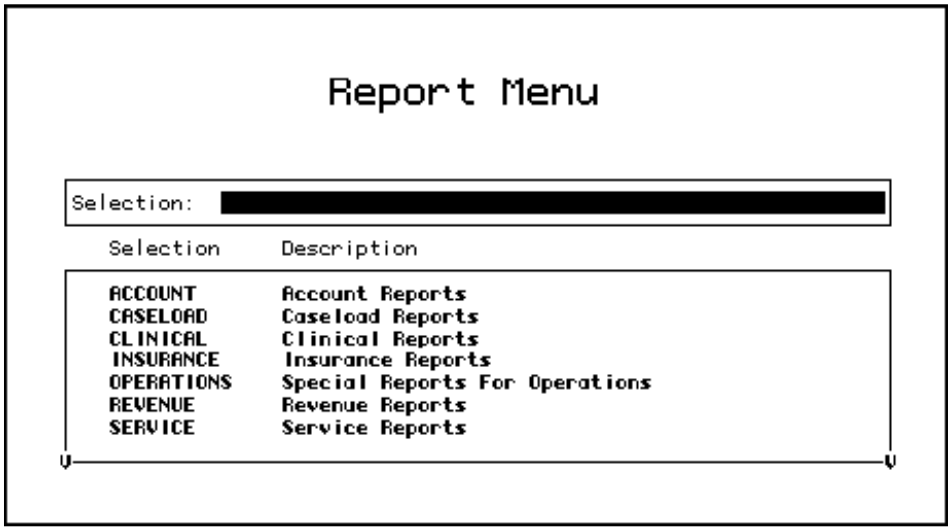


Figure 17.1: A Typical Report Menu

3. Choose the report from the submenu.

Your local Operations Staff controls how these submenus are organized, and you should ask them which menus you should have and where specific reports are.

The standard InSyst package includes these submenus for reports:

- **Caseload Reports:** contains reports on the management of the workload at the clinic level: staff caseload reports, clinic caseload reports, productivity reports, etc.
- **Service Reports:** contains staff productivity, service audit and program productivity reports.

Running Reports

Once you select a report from one of the Reports Menu, you may be prompted for information needed to produce the report. First the system will ask you questions about when the report will be created, or where the report will be printed. After that, it will ask you questions that control the content of the report, such as client number, reporting unit number, or date range that it will report on.

The following example (Figure 17.2) shows the dialogue similar to what you may see on the screen when you produce a report. The symbol <RETURN> means that pressing Return will accept the default answer to the question.

```
        REPORT_PSP118
This report may only be run in "BATCH" mode
Specify when the report generation should start up:
time      = hold until specified date/time (DD-MMM-YYYY:HH:MM)
<RETURN>  = start up immediately
?
Specify print destination
NOPRINT     = do not print report (save as disk file)
queue name  = name of printer queue (e.g.. COMMON)
<RETURN>    = print on the default printer: pq_myprinter
?
Specify number of copies
number      = number of times to print this report
<RETURN>    = 1 copy
?
Specify print setup/form
examples:
  CONDENSE  = print 132 columns on 80 column paper
  DRAFT     = print in normal 'FAST' mode
  LETTER    = print in slower 'LETTER QUALITY' mode
  <RETURN>  = print using the default
?
Send mail notification when report has completed?:
YES/NO      = send mail/do not send mail
<RETURN>    = do not send mail
?
Parameters selected:
Send to batch (release terminal)
  ,start report generation immediately
  ,use printer:  CHANATE
  ,print 1 copy of report
  ,default printer form/setup
  ,no mail notification
OK to continue? <Y/N> Y
Enter Case Number for Episode History Report
? 10000015
Submitting report REPORT_PSP118 to run in batch mode on REPORT_MHS$BATCH
Job REPORT_PSP118   SMITH (queue REPORT_MHS$BATCH, entry 1) started on REPORT_MHS$BATCH
  Jobname         Username     Entry  Blocks  Status
  -------         --------     -----  ------  ------
  REPORT_PSP118   SMITH
                  SP_SNMHS_RPT     1          Executing
    On batch queue REPORT_MHS$BATCH
****************************** all done ******************************
press <RETURN> to return to Menu
```

Figure 17.2: Sample Report Dialogue

Note: You can terminate your report request at any time by typing Control/Z. The report dialogue will terminate itself if you do not respond after a short time.

After you finished the dialog, the system displays all the options you have chosen and displays the prompt: OK to continue. Enter "Y" to produce the report, or if an option is incorrect, enter "N" to use the dialog again.

Report Dialog Questions

This section explains some questions the system may ask you. Which questions are displayed depends on the report and your level of authorization. Here is an explanation of some questions commonly used in dialogs.

Specify when the report generation should start up:

Enter a date and time, such as 19-SEP-1997:18 (September 19th at 6:00 PM), or just a time, such as 19 (today at 7:00 PM).

Some reports can be run at any time during the day. Some reports that use system resources heavily, can only be run in the evening or weekends. If you try to run a report immediately, the system may display a message with the times you can run the report.

Automatically distribute reports to program printers?:

Some reports are automatically sent to the correct printer for each reporting unit. Instead of the printer section of the dialogue show above, the dialog might say:

```
Automatically distribute reports to program printers?:
YES/NO   = distribute reports/do not distribute reports
<RETURN> = distribute reports
?
```

If you select this option, the system will send the needed version of the report to the printer for each reporting unit.

Specify print destination

Enter a printer name. If the report is set up to print at the printer assigned to the person requesting it, this printer's name will be displayed as the default. If the report is set up to print at a specific printer, this question is not asked.

Specify number of copies

Enter a number to print more than one copy of the report.

Send mail notification when report has completed?:

Enter Yes to have the system send you e-mail message when the report is completed and ready for printing. Because you generally are only notified of mail messages when you log on, this option may not be effective for most users.

Enter the Reporting Unit Number for your program

Enter the six digit reporting unit number for your program reporting units. Never enter "*" as this will request the report for **EVERY** reporting unit in the County.

Enter a starting date for the report

For service and productivity reports, you enter a date range. At this prompt, enter the first day of the range.

Enter an ending date for the report

For service and productivity reports, you enter a date range. At this prompt, enter the last day of the range.

Enter a client number

For client oriented reports, enter the client number.

Report PSP 100
Primary Staff Caseload Report

Report Description:

This report shows all clients currently assigned to each clinician in a reporting unit. It lists client name and number, episode opening date, age, primary diagnosis, last service date, and primary physician if one has been assigned. It also lists other reporting unit and staff who have open episodes for each client. It provides a total count for each staff member.

Running the Report:

Operations Staff should use the Report menu to run this report regularly—monthly or more frequently as needed—and to send the output to each Reporting Unit's printer. If you do not receive this report regularly, contact your local Operations Staff.

Using the Report:

This report gives clinicians a list of all clients for whom they are primary therapist, with basic information on each client.

Review it for accuracy. It is very important to keep the clients' Primary Therapist up to date, so reports go to the correct staff person.

Output File:

MHS_OUTPUT_REPORT:

STAFF_CASELOAD_PSP100.******_LIS.

Primary Staff Active Caseload 20-May-1993
Page 1

Report PSP 100
Vineland County Mental Health
VLD OUTPATIENT (89027)

Caseload for: AGUILAR ADELIA
Cases active as of: 3-Jan-1993

Client Name	Client Number	Opening Date	A G E	Primary Diagnosis	Last Service Date	Physician	Other RU Staff
RHONDA BARTLETT	000987605	2/08/85	39	308.30	9/29/92	BRYSON	
PAULINE BERGGREN	009876284	5/27/92	64	295.62	2/04/93	DAVIS	
Also Open At: VLD CMT		5/20/92		295.62	11/03/92		AGUILAR
Also Open At: VLD ADT		6/04/92		295.62	1/28/93		MERCADO
LINDA BOEDING	000987787	8/18/92	53	295.92	9/18/92	BRYSON	
LOUISE BORDEN	000988871	5/07/91	25	296.60	1/22/93	STAFF	
Also Open At: VLD CMT		12/07/92		296.60	2/04/93		AGUILAR
ELLA BRINKLEY	000656648	10/06/92	47	296.60	1/20/93	BRYSON	
THOMAS BUTTERFIELD	000656614	7/02/92	45	296.45	2/24/93	BRYSON	
Also Open At: VLD CMT		11/01/92		296.45	11/02/92		AGUILAR
CHRIS CARADCHECK	006566642	10/01/90	25	295.32	7/09/92	WILLIAMS	
Also Open At: VLD CMT		1/03/91		295.32	1/04/93		AGUILAR
MARY COX	000656689	9/05/90	23	300.40	12/15/92	BRYSON	
FRANK EDDINGTON	000656566	8/11/92	32	295.32	1/13/93	BRYSON	
GARY FOWLER	007878003	3/06/90	30	295.30		DAVIS	
Also Open At: WSOP		3/18/92		296.44	9/11/92		NOLAN
JENNIFER GERBIL	000788534	2/04/92	25	295.90	1/18/93	STAFF	
MARY HARDESTY	008775670	12/06/90	42	295.70	2/09/93	WILLIAMS	
Also Open At: VLD CMT		12/06/90		295.70			AGUILAR
Also Open At: VLD ADT		1/28/91		295.32	1/25/93		MERCADO
IRIS HARRIS	000788895	8/31/90	77	290.20	11/17/92	STAFF	
Also Open At: CMT-SUPPORT		11/02/90		290.20			AGUILAR
Also Open At: VLD CMT		6/05/90		290.20	1/13/93		AGUILAR
JESUS HERRERA	008788254	9/08/92	35	295.92	2/18/93	BRYSON	
KIMBERLY HILLEY	008788083	6/29/92	30	296.46	2/11/93	DAVIS	
DAVID HUMPHRIES	000878833	3/01/89	51	296.40	1/12/93	STAFF	
Also Open At: VLD CMT		6/27/91		296.70	7/13/92		AGUILAR
Also Open At: VLD ADT		10/13/92		296.70	1/12/93		MERCADO

****
Confidential Information
****

Report PSP 121
Program Caseload Report

Report Description:

This report lists all the clients with open cases for each reporting unit. It includes client number, name, opening date, age, primary diagnosis, and primary staff.

Running the Report:

Operations Staff runs this report monthly or more frequently if needed. It is routed to each Reporting Unit's printer. If you do not receive this report, contact local Operations Staff.
Users can also run this report using the Report menu.
It prompts you to enter a Reporting Unit (or enter "*" for all units) and to enter a target date. The report finds all clients open on the target date.

Using the Report:

The report is used as a management tool by program managers, to balance the work among staff or to quickly review the types of client being served. It is also used to direct the distribution of other reports, such as the Utilization Review reports.
The report might also show that it is necessary to improve the data entry process. Any duplicate clients should be reported to Operations Staff.

Output File:

MHS_OUTPUT_REPORT:

PROGRAM_CASELOAD_PSP121.******_LIS

Program Caseload 25-Dec-1992
Page 1

Report PSP121
Day Treatment (99433)
Cases active as of: 25-Dec-1992

Client Name	Client Number	Opening Date	AGE	Primary Diagnosis	Primary Staff	Physician	Account Status
SHEILA A_CLIENT	90200122	7/24/92	21	295.92	ANDERSON	MILLER	748828
PHILLIP B_CLIENT	90200192	12/01/86	21	296.70	ARGOUNT	ROBERTSON	752885
JAMES C_CLIENT	90000015	7/01/92	26	295.40	ARGOUNT	ROBERTSON	756104
MICHAEL D_CLIENT	90000001	9/01/92	31	295.35	ANDERSON	MILLER	1029321
MAXINE CLIENT	95700048	9/11/92	28	295.92	ANDERSON	MILLER	1033654
IRENE CLIENT	90000045	9/01/92	22	295.40	ANDERSON	STAFF	1038133
BERNADETTE CLIENT	91900031	9/01/86	38	295.90	ARGOUNT	ROBERTSON	1010425
ANDREW CLIENT	90000070	9/24/92	55	296.60	ANDERSON	MILLER	756612
MIKE CLIENT	02390198	7/10/92	22	302.20	ARGOUNT	STAFF	0
JOSEPH CLIENT	00390027	4/10/86	57	295.92	ARGOUNT	MILLER	320539
0							
RICK CLIENT	90000047	8/05/92	31	295.90	ANDERSON	MILLER	
JOANNE CLIENT	90200199	7/01/86	44	295.70	ARGOUNT	ROBERTSON	647054
STEFANIE CLIENT	90900015	4/01/92	21	799.90	ARGOUNT	MILLER	1000268
ROSEMARY CLIENT	90200060	7/15/86	45	295.62	ARGOUNT	ROBERTSON	459088
LINDA CLIENT	97400024	3/01/92	38	295.95	ARGOUNT	STAFF	0
ROGER CLIENT	90200070	6/01/92	22	296.60	ARGOUNT	STAFF	455572
PAULINE CLIENT	90000073	12/10/92	51	V71.09	ANDERSON	ROBERTSON	1012258
DONNA CLIENT	95700065	9/11/92	30	295.70	ANDERSON	ROBERTSON	1026356
HORTENSIA CLIENT	90100185	4/30/92	57	295.32	ARGOUNT	STAFF	604091
SAMUEL CLIENT	90300033	5/22/86	32	295.32	ARGOUNT	MILLER	1016237
MANUEL CLIENT	90000032	7/29/92	21	295.40	ANDERSON	MILLER	463778
DENNIS CLIENT	00100691	8/07/92	36	295.30	ANDERSON	ROBERTSON	1007220

TOTAL OPEN CASES FOR Day Treatment 39

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Confidential Information
****

Report PSP 131
Reporting Unit Service Summary by Provider

Report Description:

This report shows the total services by type for the specified reporting unit during the specified time period.

Running the Report:

Use the Report menu to run this report as needed. You are prompted to enter the reporting unit, time period, and printer. Enter Reporting Unit number.

Using the Report:

Use this report as a planning tool, to audit service entry and program productivity. .

Output File:

MHS_OUTPUT_REPORT:

RU_SERVICE_SUMMARY_PSP131.******_LIS

REPORT_PSP131_FILE.LIS

Service Summary 16-Dec-1992
Direct and Indirect Services Page 1

Report PSP131
Reporting Period: From 01-Nov-1992 to 30-Nov-1992

Service Site	Service Total	Total Hours
WESTSIDE OUTPATIENT (832021)		
310 Collateral	10	13.80
330 Assessment	84	123.40
340 Individual	318	330.50
350 Group	176	581.50
360 Medication	218	102.80
Sub Total for Direct Services	806	1152.10
421 Community Client Contact	3	3.33
Sub Total for Indirect Services	3	3.33
Total Services for 832021	809	1155.43

Report MHS 707
Service Audit Report

Report Description

This shows all services (based on services stamp) entered into the computer for each clincian for the day of the report run. Information includes service date, clinican, client served, procedure, number in group, service duration, service location, and co-staff. "# in Group" and Co-staff" contain an asterisk for non-group procedures.

How to Get the Report

The report generated and queued to your printer automatically the day after services are input.

How to Use the Report

Review for accuracy. The report is intended as a data entry management tool to assist a manager in making sure all the services performed in a clinic are being entered on a timely basis. If service entry is abnormally low, an audit of the data collection and service entry process may be needed. If there is incorrect information, episode and service updating may be required.

File Directory:	MHS_OUTPUT_REPORT
File Name:	SERVICE_AUDIT_MHS700.******_LIS

ALCOHOL AND OTHER DRUG 15-Mar-2001
Service Audit Report Page 1

REPORT DAS707
Provider: ST. ANTHONY'S CDF COUNTY (888860)
Input Date: 14-Mar-2001

Service Audit Date: 1-Mar-2001
Primary Therapist: TOM JONES Staff #: 95555

Case #	Client Name		Procedure	#Group	HH:MM	Location	Co-staff
019999699	BAKER	JOE	354	**	1:30	1	*****
019999299	WILLIAMS	DAVID	354	**	1:30	1	*****
019994019	WHITE	WALTER	354	**	1:30	1	*****
019997429	MONDALE	MARCIA	354	**	1:30	1	*****
019991179	WISTLER	MONTY	343	**	1:00	1	*****
019999139	HENDERSON	CHARLENE	354	**	1:30	1	*****

Service Detail Report For Mode 15, 50, and 60 Programs 8-Apr-2001
Page 1402

Report DAS700A
ALAMEDA COUNTY
MMM - MNT Core (888811)
From: 1-Mar-2001
To: 31-Mar-2001

Client Name: MICHAEL BROWN Birth Date: 1-Dec-1955 Sex: M Ethnicity: Other
Case #: 199923999 SSN: 555221111 Account Number: 199923999
Medicaid : 333333999 04/2001 Address: No address.

Diagnosis codes for the following services: Dx I: 304.00 OPIOID DEPENDENCE
Dx II: 799.90 DIAGNOSIS DEFERRED- AXIS I/II
Dx III: Unknown label

Service Date	Proc code	Service Procedure	Primary Staff	Primary Staff Time		Co - Staff	Co Staff Time	Cost of Service	Tmt Loc
3/01/2001	704	DAILY	WHITE	(69999)	00:08	(0)	00:00	9.08	1
3/02/2001	704	DAILY	WHITE	(69999)	00:08	(0)	00:00	9.08	1
3/03/2001	704	DAILY	WHITE	(69999)	00:08	(0)	00:00	9.08	1
3/04/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1
3/05/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1
3/06/2001	791	NTP - INDIVIDUAL COU	DUGAS	(69999)	00:30	(0)	00:00	38.34	1
3/06/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1
3/07/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1
3/08/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1
3/09/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1
3/10/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1
3/11/2001	704	DAILY		(0)	00:08	(0)	00:00	9.08	1

EXHIBIT A

Special Key Sequences

The Num Lock key sequences, Control key combinations, and Special Function keys used in InSyst are listed below.

Num Lock Key Sequences

The Num Lock Key is the PF1 Key on Digital Equipment Corporation terminals, and is the NumLock key on PCs. Other keys may be used on other terminals.

To use Num Lock Key sequences, press the Num Lock Key, release it, then press the next key. For example, if the instructions say you should press Num Lock-E, it means you should press the Num Lock key, release it, and then press "E" and release it.

Num Lock Key sequences used in InSyst are:

- **Num Lock-A: (All / Authorize)** gives you additional functions in entry and maintenance screens, such as All Clients/Services, Supervisor Mode and Late Entry Mode.
- **Num Lock-B: (Backup)** makes the screen page back one page, to display records in a list that cannot fit on a single screen.
- **Num Lock-C: (Client #)** moves the cursor to the Client Number field on some screens.
- **Num Lock-D: (Down Two)** makes the screen page forward two pages, to display records in a list that cannot fit on a single screen.
- **Num Lock-E: (Exit)** exits from the current screen and returns to the menu, without saving data entered in the screen, or returns to the previous menu.
- **Num Lock-F: (Face Sheet)** request the menu to select Face Sheets, then press F6 to complete the request.
- **Num Lock-H: (Home)** moves the cursor to its home position on the current screen, the field on the screen where data entry began.
- **Num Lock-I: (Insert)** inserts a new record when you are using the Maintenance Selection screens.
- **Num Lock-M: (More)** makes the screen page forward one page, to display records in a list that cannot fit on a single screen.
- **Num Lock-R: (Refresh)** restarts the screen, with no values entered. This is useful if you made mistakes in data entry.
- **Num Lock-S: (Save and Exit)** leaves the current data entry or maintenance screen, and saves the data entered. This sequence retains the current Client and Reporting Unit, so it automatically displays it in the next screen you use.
- **Num Lock-U: (Up Two)** makes the screen page back two pages, to display records in a list that cannot fit on a single screen.

Control Key Combinations

To use Control Key combinations, continue holding down the Ctrl Key while you press the next key in the sequence. For example, if the instructions say to press Control/W, you should press the Ctrl Key, keep holding it down while you press "W", and then release both.

Control Key combinations used in InSyst are:

- **Control/H: (Hop Back)** moves the cursor back one field.
- **Control/J: (Junk)** clears a field.
- **Control/W:** repaints or refreshes the screen. Use it if the screen display has been disturbed.
- **Control/Z:** ends an editing session in the Mail.

County Codes

01 – Alameda
02 – Alpine
03 – Amador
04 – Butte
05 – Calaveras
06 – Colusa
07 – Contra Costa
08 – Del Norte
09 – El Dorado
10 – Fresno
11 – Glenn
12 – Humboldt
13 – Imperial
14 – Inyo
15 – Kern
16 – Kings
17 – Lake
18 – Lassen
19 – Los Angeles
20 – Madera
21 – Marin
22 – Mariposa
23 – Mendocino
24 – Merced
25 – Modoc
26 – Mono
27 – Monterey
28 – Napa
29 – Nevada
30 – Orange
31 – Placer
32 – Plumas
33 – Riverside
34 – Sacramento
35 – San Benito
36 – San Bernardino
37 – San Diego
38 – San Francisco
39 – San Joaquin
40 – San Luis Obispo
41 – San Mateo
42 – Santa Barbara
43 – Santa Clara
44 – Santa Cruz
45 – Shasta
46 – Sierra
47 – Siskiyou
48 – Solano
49 – Sonoma
50 – Stanislaus
51 – Sutter***
52 – Tehama
53 – Trinity
54 – Tulare
55 – Tuolumne
56 – Ventura
57 – Yolo
58 – Yuba/Sutter***

*** Use 58 for Sutter and Yuba Counties as they share a reporting code.

State Codes

AL – Alabama
AK – Alaska
AZ – Arizona
AR – Arkansas
CA – California
CO – Colorado
CT – Connecticut
DE – Delaware
DC – District of Columbia
FL – Florida
GA – Georgia
HI – Hawaii
ID – Idaho
IL – Illinois
IN – Indiana
IA – Iowa
KS – Kansas
KY – Kentucky
LA – Louisiana
ME – Maine
MD – Maryland
MA – Massachusetts
MI – Michigan
MN – Minnesota
MS – Mississippi
MO – Missouri
MT – Montana
NE – Nebraska
NV – Nevada
NH – New Hampshire
NJ – New Jersey
NM – New Mexico
NY – New York
NC – North Carolina
ND – North Dakota
OH – Ohio
OK – Oklahoma
OR – Oregon
PA – Pennsylvania
RI – Rhode Island
SC – South Carolina
SD – South Dakota
TN – Tennessee
TX – Texas
UT – Utah
VT – Vermont
VA – Virginia
WA – Washington
WV – West Virginia
WI – Wisconsin
WY – Wyoming

INSYST MENU SHORTCUT & COMMANDS

CLIENT SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Client Locator	CLIE LO	1 7
Client Registration	CLIE RE	1 1
Client Management (Maintenance/Update)	CLIE MA	1 2
Client Address	CLIE AD	1 6

EPISODE SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Episode Open	EP OP	4 1
Episode Close	EP CL	4 2
Episode Management (Maintenance/Update)	EP MA	4 4

SERVICE ENTRY SCREENS

Screen	Alpha Menu Commands	Numeric Menu Commands
Service Single Entry	SER SI	5 1
Service Multiple Entry	SER MU	5 4
Service Weekly	SER WE	5 3
Service Management (Maintenance/Update)	SER MA	5 9

MOST USED COMMANDS

Clear Field	Ctrl J
All Clients (Continuous Paging) Authorization (Supervisor & Late Entry)	Num Lock (Gold) A
Insert new data (Address, CSI & Utilization Control data entry screens)	Num Lock (Gold) I
Move Cursor forward one Field	TAB Key
Move Cursor backward one Field	F12 Key
Move Down to next Page (i.e. list of clients)	Num Lock (Gold) M
Move Back to last Page (i.e. list of clients or services)	Num Lock (Gold) B
Exit Screen (go back to last screen/menu)	Num Lock (Gold) E
Refresh Screen (Clear a screen without leaving the screen)	Num Lock (Gold) R
Save the client information and go back one screen	Num Lock (Gold) S

PRINTER COMMANDS

Show Printer Queue	UT PR SH	13 4 1
Start Printer Queue	UT PR ST	13 4 2